



Handbook

for

Society of Vertebrate Paleontology

Version 1.14

5/2026

Revision History

Name	Date	Reason for Changes	Version
Jennifer Holland, ED	8/15/12	Initial Documentation	Draft, 1.1
Jennifer Holland, ED	4/22/13	Completed Draft for Executive Committee Review	Draft, 1.2
Jennifer Holland, ED	7/8/13	Completed Edits for final Executive Committee Approval	1.3
Jennifer Holland, ED	8/20/13	Added gift acceptance policy and incorporated it with older new fund policy	1.4
Jennifer Holland, ED	1/20/15	Additional SEDN award benefits (6.12.4), policy on committee and panel membership requirements (7.11.9), consolidation of MLC and Web committees to a Communication Committee (4.3.2), Cohen Award addition (6.17), ExCom senior award assignments (6.8,9,13), COI (7.15), addition of non-discrimination and sexual harassment policies, updated investment policy (7.1), updated ethics statement, guidelines and procedures.	1.5
Jennifer Holland, ED	TBD	Addition of 7.19 policy on review of support requests from other meetings and events	1.6
Serena Weisman, ED	9/12/18	Add the National Geographic name to the Lanzendorf PaleoArt Awards	1.7
Serena Weisman, ED	10/20/18	Change 7.17 to New Professional Conduct, Collegiality, and Harassment Policy	1.8
Serena Weisman, ED	8/5/19	Change 7.17. to the new Annual Meeting Code of Conduct Change the name of the SEDN award to the Jon C. Graff International Paleontology Award	1.9
Lee Lowery, ED	6/23/19	Added Diversity Committee charge (4.1.2) Updated 4.1.6.3 to remove Election timeline and reference bylaws Updated 7.9 Elections	1.10
Lee Lowery, ED	5/17/22	Added Carroll Award (6.18) Added "Carroll Fund" to section 7.1.1	1.11
J M. Theodor, Past President	2/28/23	Updated Added information about unsuccessful award notifications to all awards Added SVP FUTURES Award () Added "SVP FUTURES Award Fund" to () Added Field Training Award () Added "Field Training Award Fund" to () Added Collection and Repository Committee to () Updated Investment Policy () Added new Executive Committee Members at Large Ethics () and updated terms of office Restructured document	1.12

Margaret Lewis, Past President	11/27/24	Restructured document and updated	1.13
Kristi Curry Rogers, Vice President	5/1/2026	Restructured document, clarified procedures, revised ethics procedures to align with best practices	1.14

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1. Purpose and Scope

1.1. Society Mission and Objectives

The Society advances the science of vertebrate paleontology by promoting rigorous research and fostering collaboration among those concerned with vertebrate history, evolution, anatomy, taxonomy, and the fossil record, including the collection and analysis of fossil vertebrates and the stratigraphy of the beds in which they are found. The Society is dedicated exclusively to educational and scientific purposes.

The Society is committed to building an inclusive community of professionals, students, and enthusiasts. It facilitates the exchange of knowledge, supports the development of future scientists, and promotes education and public outreach. The Society also works to raise awareness of the importance of fossil vertebrates in understanding Earth's history and is dedicated to the conservation and preservation of fossil sites and specimens.

1.2. Journal Mission and Scope

The *Journal of Vertebrate Paleontology* advances the mission of the Society by serving as an internationally recognized forum for the publication and dissemination of high-quality, peer-reviewed research in vertebrate paleontology. The Journal supports the global scientific community through the broad distribution of scholarly knowledge, fostering research, communication, and professional engagement across the field. In doing so, the Journal also contributes to the sustainability of the Society and its programs that promote education, research, and professional development in vertebrate paleontology.

2. Membership

2.1. Membership Categories and Eligibility

The Society welcomes applications for membership from any person whose qualifications and interests have been demonstrated by experience, publications, or by other factors detailed below. If the validity of an application is questioned, the final decision will be made by the Membership Committee.

2.1.1. Regular Membership. Open to individuals over the age of 18 with a professional or personal interest in the field. Regular Members may choose a one-year or three-year membership.

- **Regular Member Residing in a Middle HDI Country:** For residents of nations with a UN HDI index of 0.85–0.55.

- **Regular Member Residing in a Developing Country:** For residents of nations with a UN HDI index of <0.55.
- 2.1.2. Transitional Early-Career Membership.** Available to Student Members who are approaching the end of training. This category offers a discounted rate for a three-year term to help bridge the gap between academic and employment years.
- 2.1.3. Undergraduate/Graduate Student Membership.** Open to students in undergraduate or graduate-level studies. Applicants must provide a valid university or college identification card and the signature of an advisor or authorized academic official or a sponsoring regular Society member.
- **Standard Student Membership:** For students residing in high-income nations.
 - **Student Member Residing in a Middle HDI Country:** For students residing in nations with a [UN HDI index](#) of 0.85–0.55.
 - **Student Member Residing in a Developing Country:** For students residing in nations with a [UN HDI index](#) of <0.55.
- 2.1.4. Junior Membership.** Open to individuals between 14–17 years of age (as of January 1 of the application year). Upon turning 18, Junior Members must transition to another form of membership.
- **Application Requirements:** A parent or legal guardian must sign the application. Applicants must provide a 250–500 word personal statement regarding their interest in the Society and a letter of reference from a teacher, Society Member, or person in the field of vertebrate paleontology.
 - Junior members do not have voting rights, but qualify to receive a discounted registration rate for SVP Annual Meetings. They must be accompanied by a parent or guardian while attending the Annual Meeting.
- 2.1.5. Emeritus Membership.** Open to members who are retired from formal employment and have been a member for at least thirty years (not necessarily continuously).
- 2.1.6. Honorary Membership.** A lifetime free membership awarded to individuals (both members and non-members) in recognition of contributions to the field. Honorary members are selected annually by nomination during the normal awards submission period. Up to two new honorary members may be named each year.
- 2.1.7. Donor Membership.** Regular members may select Donor Membership when joining or renewing their memberships by adding a donation to their membership dues: Contributing Member (\$100 donation); Sustaining Member (\$250 donation); Partner Member (\$500 donation); Patron Member (\$1000 donation). Donor members are recognized in the Annual Meeting Program Book. Stand-alone donations do not affect member type.

2.2. Member Rights and Responsibilities

2.2.1. Application and Dues. Individuals join the Society via online application and payment to the Business Office. Membership is not complete until payment is received.

- **Calendar Year Basis:** All memberships operate on a calendar year. Dues paid prior to the conclusion of the Fall Annual Meeting are applied to the current calendar year. Dues paid after the Fall Annual Meeting are applied to the next calendar year.
- **Meeting Discounts:** Individuals must be a member of the Society for the current calendar year to receive meeting registration discounts.

2.2.2. Ethics Compliance. All member applicants must agree to abide by the Society's Code of Conduct [Bylaws Section 12; Handbook Section 3].

2.2.3. Society Service Requirements

- **Membership.** Individuals participating in society service (e.g., committee, session moderator, etc.) are usually current society members. This policy generally applies to all committees, subcommittees, and panels. Committees and working groups may invite non-members with needed expertise to join them. In these cases, the Executive Committee must approve the invitation, and the invited individual must adhere to the same ethics guidelines self-disclosure as Society members.
- **Self-Disclosure.** To ensure a safe and professional environment for all participants, the Society requires all volunteers (e.g., committees, panels, workshop leaders, session moderators, award winners) to attest to their history of professional and ethical conduct via an online self-disclosure form (Addendum 1; Section 3.4).
- **Renewal Deadlines.** Individuals wishing to serve must renew their society membership by April 15th of any given year to continue active participation. If membership has not been renewed by April 15th, the individual will be suspended from service activities until the membership is reactivated.

2.3. Affiliated Society Memberships

The Society itself shall not be a paid, affiliate, or voluntary member of any other organization unless the Executive Committee has reviewed the proposal and associated benefits. The Executive Committee must deem the relationship beneficial to the membership and the profession of Vertebrate Paleontology as a whole.

2.3.1. Proposals and Review

- **Proposals:** All current Society members are welcome to propose membership in any Society to the Executive Committee for consideration and processing.

- **Annual Review:** Memberships should be reviewed annually along with budgetary considerations to determine the value of continued membership.

2.3.2. Current Affiliations The Society is currently (as of March 2026) a member of the American Geosciences Institute (AGI), the American Institute of Biological Sciences (AIBS), the International Paleontological Association (IPA), and the National Center for Science Education (NCSE).

3. Ethics, Non-Discrimination, & Professional Standards

3.1. Purpose and Core Commitment

The Society is dedicated to an inclusive, welcoming, and professional environment. We believe respect and equitable opportunity for all individuals are integral to the advancement of our Society and to the rigor and ingenuity of paleontological research.

To maintain this environment, the Society requires individuals to uphold the highest professional standards in their interactions, research, and educational activities, including in the collection, documentation, curation, and publication of vertebrate fossils.

Any individual found to have violated these standards may be subject to disciplinary or remedial action.

Scope: These standards apply to members of the Society, as well as individuals who may reasonably be expected to publish in Society publications or participate in Society events in the future.

Jurisdiction Settings: Our policies cover conduct in all professional and educational settings, including but not limited to:

- Conferences, meetings, workshops, panels
- Professional and educational fieldwork settings
- Formal and informal educational spaces
- Research facilities and settings
- The Journal of Vertebrate Paleontology
- Online platforms and social media affiliated with the Society

3.2 Non-Discrimination Policy

The Society does not and shall not discriminate on the basis of race, color, national origin, immigration status, age, religion, socioeconomic background, educational background, marital or parental status, disability, military service or veteran status, sex, sexual orientation, gender identity, or gender expression in any of its activities or operations.

3.3 Member Code of Conduct

Membership or participation in the Society constitutes an agreement to adhere to this code of conduct.

3.3.1. General Expectations

- **Treat others with dignity and respect:** This applies regardless of background or professional status. Respect all roles and acknowledge the contributions of professional scientists, students, technicians, volunteers, artists, and collaborators.
- **Communicate with Civility:** Engage in professional discourse.
- **Mentor Responsibly:** Encourage students in a manner that is inclusive and recognizes education as fundamental to professional development.
- **Prioritize Safety:** Adhere to rules and policies of affiliate societies, meeting venues, collections, research facilities, and field sites.
- **Honesty and Scientific Integrity.** Members will not attempt to injure the reputation or professional opportunities of others through false and/or biased claims. Members must represent research accurately when engaging with the press. Members will not intentionally reveal the results of embargoed research to colleagues or the public while an embargo is active, nor will they reveal the unpublished work of others without the explicit permission of the author(s) and/or principal investigator(s).

3.3.2. Prohibited Behaviors

The following behaviors are strictly prohibited:

- **Harassment:** Any form of harassment, including sexual harassment, bullying, denigrating language, stereotyping, or a recurring pattern of microaggressions.
- **Abuse and Intimidation:** Physical, verbal, or written abuse or intimidation. This includes threats of physical, emotional, professional, or financial harm, as well as any disregard for another's physical safety.
- **Discriminatory Conduct:** Harmful comments or conduct related to race, color, national/ethnic origin, immigration status, religion, age, marital/parental status, sex, sexual orientation, gender identity/expression, socioeconomic background, education, disability, or veteran status.
- **Violation of Boundaries:** Persisting in behaviors after boundaries have been communicated (verbally or nonverbally), or violating boundaries based on personal preferences of another individual.
- **Unwanted Contact and Stalking:** Intentional, unwelcomed behaviors including stalking, unwanted physical contact, and aggressive body language.
- **Unauthorized Recording:** Photographing, recording, or filming others, or distributing such material, without express consent.
- **Inappropriate Content:** Displaying or distributing images or media depicting bigotry, nudity, sexual activity, or physical violence.

- **Hostile Environment:** Any other behavior reasonably assumed to create, contribute to, or maintain an environment that is hostile, offensive, or damaging to a person or group.

3.3.3. Research Standards: Fieldwork and Collections

3.3.3.1. Legal Compliance and Permitting

- **Permits:** Individuals collecting or studying fossil materials must obtain all legally required permits or permissions. This includes necessary permits and/or permissions to: conduct fieldwork on public or private lands, whether domestic or foreign; loan, transport, and/or export of fossil materials from their place of origin or housing institution; and/or engage in examination, publication, documentation, imaging, and/or analysis (including consumptive methods) of fossil materials from the housing repository and/or owner.
- **Responsibility:** Fieldwork leaders (e.g., principal investigators and/or field managers) are responsible for determining land ownership and securing permissions. As regulations and ownership change over time, these must be reconfirmed before every collection effort. Principal investigators are responsible for research permissions. However, any participating individual who knowingly and willfully ignores permitting regulations may be considered in violation.
- **Export Compliance:** Individuals must not knowingly carry out research work on specimens that have been illegally exported from their country of origin.

3.3.3.2. Data Integrity

- **Context:** Collection must include documenting provenance, including stratigraphic, geographic, taphonomic, and paleoenvironmental information.
- **Field Data:** Original field data (e.g., notebooks, electronic files) must be preserved. A legible copy of these data must accompany the fossils and become part of the deposited collection.
- **Curation and Repository Requirements:** Fossils collected from public lands (and private lands, if stipulated) must be deposited and accessioned in a timely manner in a qualified, publicly accessible repository. Repositories are defined as institutions dedicated to scientific research and education in perpetuity. Furthermore, research and publication may only be carried out on vertebrate fossils that are already deposited in, or immediately destined for, collections committed to storing specimens and associated data in perpetuity.
- **Access to Collections:** Curation requires proper housing, labeling, and the maintenance of the association between specimens and metadata, including field and preparation data. These materials must be made available to the scientific community and the interested public within a reasonable period; access for researchers is an essential quality of a registered public collection.

- **Deaccessioning:** If vertebrate fossils are to be deaccessioned from registered collections, procedures should follow the recommended guidelines outlined by the American Association of Museums (AAM) and/or accord with the International Council of Museums (ICOM) code of ethics.

3.3.3.3. Commercial Sale of Fossils

The Society maintains strict policies regarding the commercial sale of fossils to ensure specimens remain available for scientific study. Refer to **Bylaws Article 12, Section 6** for specific requirements related to commercial fossil collection.

3.3.3.4. Use of Generative Artificial Intelligence (AI) Tools

The Journal of Vertebrate Paleontology follows the Taylor & Francis Artificial Intelligence (AI) Policy, which provides guidance to authors, editors, and reviewers. Refer to the [Taylor & Francis website](#) for specific guidelines.

3.4. Self-Disclosure

To ensure a safe and professional environment for all participants, the Society requires all volunteers (e.g., committees, panels, workshop leaders, session moderators, award winners) to attest to their history of professional and ethical conduct via a self-disclosure form (Addendum 1). The past ten (10) years are considered for most positions. There is an unlimited lookback period for those in leadership roles (e.g., Executive Committee, Senior Editor). Misrepresentation of conduct on self-disclosure form will result in sanction [**Section 3.6.7.2.**]

3.5. Conflict of Interest Policy

By accepting any Society service role [**Section 2.2.3.**], individuals automatically agree to uphold the highest ethical standards. This duty requires such persons to exercise their authority solely in the interest of the Society, not in their own interest or the interest of another entity or person. It forbids engaging in activities that are competitive with, harmful to, or usurp legitimate business opportunities of the Society.

A Conflict of Interest (COI) exists when an officer or committee member has a business, financial, leadership, employment, family, personal, professional, or other material relationship with a third party that may:

- Call into question the individual's ability to act solely for the benefit of the Society.
- Involve improper gain or advantage for the individual.
- Have an adverse effect on the Society's interests.

All individuals acting on behalf of the Society, especially regarding award decisions, business/financial choices, and policy, must adhere to the following:

- **Disclosure:** All actual or potential conflicts must be fully disclosed to the relevant Committee Chair as soon as such relationships or situations arise.

- **Recusal:** An individual must be proactive in recusing themselves from deliberations and voting on matters related to the COI. They should physically leave the room or disconnect from the call during the specific discussion to ensure free deliberation by the remaining members.
- **Recording:** All disclosures and recusals must be officially recorded in the meeting minutes.
- **Violations:** If a member of the Society has violated the Conflict of Interest Policy the primary point of contact is the Chair of the relevant committee. However, if a Committee Chair is the subject of the report, the reporter should report the violation to the **Ethics Committee** in accordance with standard reporting procedures [Section 3.6.].

3.6. Reporting and Grievance Procedures

3.6.1. Reporting Violations

If you witness or experience prohibited behavior, the Society provides specific channels to submit a written report and supporting evidence through our [NAVEX platform](#). Only non-anonymous reports will be considered. Reports can be made by members and non-members. Senior Editors of the Journal of Vertebrate Paleontology will also use NAVEX to file reports related to violations of JVP's publishing requirements.

3.6.2. Immediate Action

Anyone witnessing behavior that constitutes an immediate threat to safety or a crime should contact local law enforcement immediately. If you experience or witness prohibited behavior that is not an immediate threat to public safety during an SVP event, and need to stop the observed behavior, please alert the leader of the event immediately, and as soon as possible, any member of the Ethics Committee or member who has completed the SafeSVP training (indicated by a SafeSVP sticker). In order to prompt additional action by the Ethics Committee, you must file an official report as soon as possible as outlined in [Section 3.6.3.].

3.6.3. Grievance Reporting - Required Information

To ensure a fair and efficient review, all allegations submitted through NAVEX must contain the following information. **Note:** Cases without these details will not be considered.

- **Reporter Info:** Name and contact information of the individual submitting the allegation.
- **Respondent Info:** Name(s) of individual(s) alleged to have engaged in the prohibited behavior, including as much identifying information as possible.
- **Victim Info:** Name and affiliation of the victim(s), if applicable.
- **Description:** A detailed description of the violation, including date(s), circumstances, and the specific type of prohibited behavior defined in the Code of Ethics. Include names and affiliations of witnesses where possible.
- **Evidence:** Any documentation or relevant items with a description of how each relates to the allegation.

- **Conflict of Interest Statement:** A statement regarding any real or perceived conflicts of interest related to any party named in the allegation (reporters, victims, respondent, witnesses) or members of the Ethics or Executive Committees.

3.6.4. Review Process & Confidentiality

- **Initial Review:** The Ethics Committee Chair reviews the initial report to determine if any conflicts of interest (COI) exist.
 - **Recusal:** If a member of the Ethics Review Subcommittee (ERS, [Section 5.2.3.]) has a conflict of interest, they must be recused. In this case, the Ethics Committee Chair will appoint another member (usually a former member of the ERS or the Executive Committee) to serve in an *ad hoc* Ethics role.
- **Case Assignment:** The Chair appoints an ERS member as the case handler.
- **Case(s) Move to Inquiry or Dismissal.** If the ERS agrees that a case does not violate the code of ethics and/or lies outside our areas of jurisdiction, the case will be dismissed. A note will be entered into the case file summarizing the reason(s) for case dismissal. If the ERS finds that there may have been ethics code violation(s), the case will move to an inquiry phase. Multiple cases filed on the same issue may be consolidated into a single case.
- **System Integrity:** Interactions with case files are logged and recorded; case files cannot be accessed anonymously by ERS members. ERS members must post notes in NAVEX as cases proceed.
- **Case Status:** Reporters are responsible for checking the status of reports independently; the NAVEX system does not provide automatic updates.
 - **Save Your Credentials:** When a report is filed, NAVEX will provide a unique "**Report Key.**" Reporters must keep this key and password in a safe place; they are required to access the system.
 - **Check for Updates:** Reporters may log in using the Report Key and password **24 hours** after filing to check for feedback or questions from the Ethics Committee.

3.6.5. Respondent Notification

The Ethics Committee will notify the individual(s) accused of an Ethics Code violation regarding the details of the report and offer them 10 days to respond.

Important Note for Reporters: Reporters should be aware that the ERS will share a summary of the report with the respondent, and that this summary will likely include identifying details.

3.6.6. Investigation and Adjudication

If the Ethics Review Subcommittee determines that enough evidence exists to warrant action:

1. **Inquiry:** The Ethics Review Subcommittee shares a summary of the report with the respondent(s). The ERS will only request and consider evidence submitted by the reporter(s) and the respondent(s), including additional documentation, witness statements, and other forms of evidence and/or statements. The ERS will resolve cases as quickly as possible, typically within 90 days. Inquiries may be prolonged if there are

multiple, related reports, or if the ERS must await legal documentation or other materials. Reporters should understand that SVP's process may be impeded when other institutions are pursuing similar investigations that require confidentiality.

2. **During an Ethics Investigation:** The ERS may temporarily bar individuals under investigation from consideration for society awards, honors, from committee or other volunteer service, from publishing in the *Journal of Vertebrate Paleontology*, and/or from attending Society functions.
 - Note:** An ongoing inquiry will not be terminated if the respondent withdraws from SVP membership, committees, events, or JVP paper submissions.
3. **Escalation:** If the ERS inquiry results in a recommendation of specific disciplinary action/sanction, the ERS report is shared with the Executive Committee via the Vice President (liaison).
4. **Blind Review:** To ensure a fair and unbiased process, the names of both the reporters and the person(s) in violation are **excluded** from the Executive Committee discussion and minutes.
 - o **Recusal:** If a member of the Executive Committee recognizes aspects of a case that reveal a conflict of interest, they must recuse themselves.
5. **Recommendation:** After hearing the ERS case report and discussing, the Executive Committee will vote to approve (or modify) recommended sanctions/disciplinary actions. The Ethics Committee Chair will communicate the sanctions to the respondent.
6. **Case Details are Confidential.** Case details, including complaints, findings, and sanctions, are strictly limited to the Ethics Review Subcommittee and Executive Committee. Information is not shared further unless a specific body must implement sanctions (e.g., the Ethics Committee Chair will notify the Program Committee Chair if presenting at the Annual Meeting is barred). In these cases, only the name and sanction are shared. Names, case details, and outcomes/sanctions are not communicated to the membership (made public) nor included in a public repository (e.g., Society archives).
7. **Reporter Notification:** Reporters are notified on the NAVEX platform when a case is resolved, though specific sanctions are kept confidential unless disclosure is strictly necessary for the reporter's safety or ongoing participation in Society events.
8. **Required Reporting:** The Society reserves the right to notify affiliated societies, funding agencies, and a sanctioned member's home institution regarding misconduct findings. Notification to a member's home institution is mandatory in cases involving acts of violence, sexual misconduct, and/or physical harm. In all such circumstances, the Society may be required to disclose limited information obtained during the investigation.

3.6.7. Disciplinary Action

The Executive Committee may vote to impose sanctions commensurate with the severity of the offense. Sanctions may be for a predetermined time or permanent. Each sanction is listed below in increasing order of severity. More severe sanctions can also include any/all sanctions preceding in this list:

- **Written Reprimand:** A formal written warning to the member.
- **Suspension of Privileges:** Includes one or more of the following: removal from Society positions and/or suspension from Society service; suspension from submitting abstracts as a first or presenting author, presenting at and/or attending Annual Meeting(s) and/or Society-sponsored events; suspension from submission of manuscripts to Society journal(s).
- **Denial and/or Revocation of Grants and Awards:** Return of grant funding, rescission of awards, and removal of name from Society websites.
- **Suspension of Membership:** Temporary suspension of membership for a prescribed period.
- **Permanent Expulsion from the Society:** The Society's procedures for permanent expulsion are detailed in the **Bylaws (6.b.2)**.

3.6.7.1. Sanctions Determination

In determining an appropriate sanction for a violation of the Code of Conduct, factors that may be considered include, but are not limited to:

- Nature of the violation;
- Seriousness, severity, persistence, or pervasiveness of the violation;
- Impact on the reporter and/or Society community;
- Respondent's past disciplinary record with the Society;
- Whether or not the respondent has accepted responsibility for the violation;
- Maintenance of a safe, nondiscriminatory, and respectful environment that is conducive to learning;
- Any other mitigating, aggravating, or compelling factors that the ERS determines to be relevant and admissible.

3.6.7.2. Sanctions Matrices

Minimum sanctions by type of violation of the Society Code of Conduct. The maximum sanction for any violation is permanent expulsion.

Violation of Research Standards Sanctions Matrix

Violation	Minimum Sanction
Legal compliance and permitting standards	Suspension of Privileges
Data integrity standards	Suspension of Privileges
Journal of Vertebrate Paleontology Publishing Policy	Written Reprimand
Publishing on privately owned or illegally exported specimens	Suspension of Privileges
Engaging in the barter, sale, or purchase of scientifically significant vertebrate fossils in a manner that removes them from the public trust	Suspension of Society membership for a minimum of 10 years

Violation of General Interpersonal Standards Sanctions Matrix

Violation	Minimum Sanction
Improper disruption of presentations or field trips	Suspension of Privileges
Contributing to an environment of discrimination/harassment/bullying Violating conflict of interest policy Photographing or recording of others without consent Display or distribution of prohibited images and/or recordings Misrepresentation of conduct during self-disclosure Deliberately or negligently putting others at risk	Written Reprimand
Intentional, unwelcome physical behaviors Denigrating jokes, stereotyping, repeated patterns of microaggression	Suspension of Privileges
Threats (implied or real)	Suspension of Society membership for a minimum of 5 years
Physical Abuse Violating Sexual Boundaries	Suspension of Society membership for a minimum of 10 years

3.6.8. Recidivism

The Society is committed to maintaining a safe and inclusive environment. Consequently, we uphold a strict stance against repeat offenders. Any individual with any prior substantiated violation of the Code of Conduct or Non-Discrimination Policy who is found responsible for any subsequent violation will be subject to more severe sanctions, including the possibility of permanent revocation of membership or permanent suspension of privileges. Retaining membership privileges requires consistent adherence to our community standards, as set forth in our Bylaws and in this handbook.

3.6.9. Appeals

Any party named in an allegation (reporter or respondent) may file an appeal of sanctions imposed (excluding permanent expulsion) within 60 days of the final report and notification.

- Appeals must be sent to the President and must include a narrative that explains why the sanction should be reconsidered.
- Appeals will be considered by an *ad hoc* Appeals Committee, composed of three Past Presidents. The Appeals Committee may not include any former President who served on the Ethics or Executive committees at the time the initial decision was made.
- The *ad hoc* Appeals Committee will determine whether to maintain or revise the original decision or sanctions.
- All actions and decisions of the Appeals Committee will be documented and communicated in a timely manner (usually within 30 days).

3.6.10. Statute of Limitations. There is no statute of limitations for considering violations of the Society Code of Conduct.

3.6.11. Maintenance of a Confidential Archive

The Ethics Review Subcommittee will record all allegations, communications, processes, decisions, and appeals in a secure database. Access to this database will be limited to the ERS. Reports of Code of Conduct violations will be retained indefinitely to help address repeat offenders. The Ethics Committee Chair is responsible for communicating to relevant groups (e.g., Senior Editors, Program Committee Chairs) about sanctions, and in transmitting this information to new chair upon rotation off the Committee. All past and present members of the Ethics Review Subcommittee, the Executive Committee, the Program Chairs, and the Senior Editors will honor confidentiality.

3.6.12. Transparency Report to Society

A summary report regarding investigations of the ERS will be reported to the Society during the Annual Business Meeting. Identifying information will not be included in the report. Reports and sanctions may be aggregated.

3.7. *Journal of Vertebrate Paleontology* Editorial Protocols for Ethics Cases

While the standard grievance procedure outline above governs the investigation of the member, specific protocols apply when the respondent is an author of a manuscript submitted to or published in the *Journal of Vertebrate Paleontology* (JVP). The following procedures ensure the integrity of the peer-review process while respecting the confidentiality of Ethics investigations.

3.7.1. Onboarding and General Communication

New Senior Editors must familiarize themselves with the SVP Code of Conduct and Reporting and Grievance Procedures as well as with the [Taylor & Francis Editorial Policies](#). The Ethics Committee Chair will provide a list of all temporary and permanent publishing bans (including expiry dates) to Senior Editors. This list must remain confidential. Senior Editors thus have primary responsibility for upholding sanctions related to authorship in the *Journal of Vertebrate Paleontology*.

3.7.2. Procedures When an Author Violates Editorial Policies of Code of Conduct

Senior Editors are responsible for reporting via the Navex platform if an author violates the [Taylor & Francis Editorial Policies](#) and/or the SVP Code of Conduct. They will provide a detailed report that includes the specific violations. The Ethics Review Subcommittee may recommend additional specific sanctions beyond manuscript rejection if warranted by the violation.

3.7.3 Procedures When an Author is Sanctioned

- **Notification:** The Ethics Review Subcommittee must inform the respondent author of any publishing bans before JVP Senior Editors are informed. Once the author is notified, the Ethics Committee Chair will immediately notify Senior Editors if a publishing ban is in place.
- **Manuscript Status:** If an author is sanctioned while a paper is in the pipeline, a submitted manuscript may change status as follows:

Manuscript Stage	Action Required by Senior Editors
Not yet sent for review	Un-Submit the manuscript (allows authors to submit elsewhere)
In Review	Continue to receive reviews, but do not act on them.
In Revision	Do not act on any submitted revisions

- **Communicating with Co-Authors:** Senior Editors must contact all authors individually to preserve the anonymity of the sanctioned person and to inform them that a co-author has been sanctioned. Sanctioned authors may voluntarily remove themselves and notify their co-authors so that processing of the manuscript may proceed unhindered, or may, with the consent of all authors, choose to withdraw the manuscript via Manuscript Central.
- **Resuming the Process.** Once a sanctioned author is removed, other authors may ask that the manuscript continue the review/publication process.

3.7.3. External & Institutional Involvement. If the ethics violation involves animal/human experimentation or research misconduct:

- The Ethics Committee forwards information to the author’s institution
- The Ethics Committee Chair checks in with the Institution every 3-6 months
- A finding of misconduct by the institution results in immediate rejection or retraction.

3.8. Review of Ethics Policies and Processes

A review and assessment of the Policy on Non-discrimination and Member Code of Conduct and the Ethics Review Subcommittee process for investigating reports and recommending sanctions will be conducted biennially. This will ensure that all policies and procedures are operating as intended, kept up to date, and aligned with current best practices. Review and assessment will be conducted by an *ad hoc* Review Committee of three people, appointed by

the President with the advice of the Chair of the Diversity and Inclusion Committee. The Review Committee may make recommendations to the Executive Committee.

4. Society Officers and Governance

The Society is governed by the Executive Committee, chaired by the President of the Society, and including the Vice President (President-Elect), Past President, Secretary, Treasurer, and Members-at-Large (up to 5), all elected by Society Members. Each member of the Executive Committee serves as liaison to other committees within the Society. Historical records of all individuals serving in officer positions shall be maintained in the Society archives.

4.1. Election Procedures

The Nominating Committee, composed of three to five Past Presidents, evaluates offices that will become vacant in the upcoming year and prepares a slate of potential candidates based on the following criteria:

- **Society Participation:** Prior history of activity (e.g., Annual Meeting attendance, service on a committee or as an officer)
- **Scientific Contribution:** Strength of contributions to the field of vertebrate paleontology
- **Administrative Experience:** General service in other scientific societies or expertise relevant to the office
- **Availability:** Willingness and ability to serve
- **DEI:** Diversity, equity, and inclusion priorities of the Society, to ensure representation of underrepresented groups.
- **Self-Disclosure:** Self-disclosure attesting to history of professional and ethical conduct.

4.1.1. Process and Timeline:

- **Approval:** The Nominating Committee shares their slate of potential candidates with the Executive Committee, who must vote to approve the slate.
- **Nomination:** Candidates are notified of their nomination. Once they accept, candidates must provide a biography (350-500 words) addressing the criteria above and outlining their goals/initiatives, and complete an updated Self-Disclosure Form.
- **Voting:** Elections are conducted via an online survey of the membership in April or May.
- **Announcement:** Candidates are contacted via email to inform them of election outcomes, which are then announced to the membership via email.
- **Inauguration:** Terms of office begin and end between the second and third day of the annual meeting.

4.2. The Executive Committee (ExComm)

The Executive Committee acts as the governing body of the Society and is responsible for setting policy, managing finances, and overseeing key operations such as the Journal and Annual Meeting. The Committee is composed of up to ten members - five officers and up to five Members at Large - and acts on the membership's behalf through majority vote. Beyond governance, members (excluding the President and Past President) serve as liaisons to other committees. In this role, ExComm members provide guidance to committees and advocate on their behalf to ExComm without assuming the responsibilities of a committee chair. The liaisons will also present reports from their assigned committees at the ExComm meetings in May and at the Annual Meeting.

4.2.1. President

Authority: Chief Executive Officer. Presides at Annual Meeting and ExComm meetings.

Term: Two years (follows a two-year term as Vice President; transitions to Past President for two years).

Responsibilities:

- **Meetings:** presides over the Annual Business Meeting, ExComm meetings (Annual, Spring, Bimonthly/quarterly online meetings).
- **Execution:** Executes decisions of the ExComm and membership.
- **Appointments:** Appoints Committee Chairs and Liaisons (subject to ExComm approval); appoints replacements for vacancies; creates ad-hoc Task Forces.
- **Financial:** Serves on the Finance Committee; authorizes travel based on need/funding availability; ensures grant conditions are met; signs contracts (including the *Journal of Vertebrate Paleontology* publishing contract).
- **Communication:** Signs official Society letters, election notifications, and committee chair appointments.
- **Ceremonial:** Presents awards at the Annual Meeting.

4.2.2. Vice President

Authority: Provides continuity of decision-making; assumes highest authority in the President's absence.

Term: Two years (automatically succeeds to Presidency).

Responsibilities:

- **Succession:** Presides over meetings if the President is absent.
- **Parliamentarian:** Acts as a parliamentarian for ExComm meetings.
- **Strategy:** Identifies long-range planning goals for implementation during their tenure as President.
- **Ethics:** Acts as liaison to the Ethics Committee.
- **Documentation:** Maintains the Society Handbook; reviews it annually for updates in collaboration with the Past President.
- **Support:** Assists the President in administering Society affairs.

4.2.3. Past President

Authority: Provides “institutional memory” and experience.

Term: Two years (immediately following Presidency).

Responsibilities:

- **Crisis Management:** Leads the ExComm to restore leadership if both the President and Vice President cannot serve.
- **Documentation:** Reviews the Society Handbook annually for updates in collaboration with the Vice President.
- **Advisory:** Attends calls with the President/Vice President or committees as requested.
- **Financial:** Works in collaboration with the Development Committee Chair and its ExComm Liaison to identify and cultivate Society donors.
- **Communication:** Participates in Annual Business Meeting and other online forums (e.g., Town Halls)

4.2.4. Secretary

Authority: Chief Recording Officer.

Term: Three years (eligible for one re-election).

Responsibilities:

- **Records:** Records minutes and proceedings of all ExComm meetings and the Annual Business Meeting.
- **Documentation:** Distributes minutes, approved motions, and action items to officers within two weeks of meetings.
- **Tracking:** Maintains a running list of action items and coordinates with leadership to ensure completion.

4.2.5. Treasurer

Authority: Chief Fiscal Officer. Safeguards funds and monitors disbursements.

Term: Three years (unrestricted re-election).

Responsibilities:

- **Budgeting:** Prepares the provisional annual budget with the Executive Director; reviews Annual Meeting budgets one year in advance.
- **Reporting:** Presents the annual audit, financial statements, and final budget to the ExComm at the Spring Meeting.
- **Oversight:** Monitors disbursements against approved budgets; reviews fiscal contracts; serves as Chair of Finance Committee.
- **Compliance:** Authorizes bill payments; signs the annual tax return; ensures IRS/government reporting compliance.

4.2.6. Members-at-Large

Authority: Voting members of the Executive Committee representing the general membership.

Term: Three years (eligible for one re-election)

Responsibilities:

- **Liaison:** Serve as liaisons to Society Committees as appointed.
- **Special Initiatives:** Undertake specific projects at the direction of the President or ExComm.

4.3. Logistics and Administration**4.3.1. Officer Reimbursements**

Reimbursements are strictly for costs incurred to perform governance duties. No per diem or personal expenses (meals, banquet tickets) are covered. Requests must be submitted within 3 months.

Meeting	Reimbursable Expenses	Notes
Mid-Year (Spring)	Economy Airfare (advance purchase)	Meals are provided during the meeting
	Ground Transportation	In years that meeting is held virtually expenses are not reimbursed.
	Hotel (2 nights)	
Annual Meeting	Economy Airfare (advance purchase)	Hotel coverage offsets cost of early arrival for ExComm meeting.
	Ground Transportation	Complimentary registration is not provided.
	Hotel (1 night)	

Note: The President and Vice President receive a complimentary guest room for the duration of the Annual Meeting via hotel contract concessions.

4.3.2. Filling Unexpected Vacancies

If an officer cannot complete their term:

1. The President (or acting President) names a replacement.
2. The replacement must be approved by the Executive Committee.
3. The replacement serves the remainder of the original term.
4. Candidates may be selected from previous ballots or the general membership, provided they meet the office requirements.

5. Society Committees and Activities

Much of the Society's work is carried out by volunteer committees. Unless otherwise noted in the specific committee descriptions below, all Standing Committees adhere to the following operational standards:

- **Appointments:** The President appoints the Chair. The Chair (in consultation with the President) appoints members.
- **Eligibility:** Chairs and members must be current, paid members of the Society unless specifically invited for outside expertise. All Society volunteers must complete a Self-Disclosure Form and honor the Conflict of Interest Policy.
- **Terms:** Chairs serve three-year, renewable terms. Performance is reviewed by the Executive Committee (ExComm) on this cycle.
- **Composition:** Committees typically consist of a Chair and up to twelve (12) members.
- **Liaisons from ExComm:** The President appoints an ExComm member to serve as a liaison to each committee.
- **Liaisons to Other Committees:** Committees are expected to keep liaisons from other relevant committees informed by inviting them to meetings and sharing reports.
- **Reporting:** Committees must report activities to ExComm twice annually, prior to the Annual and Mid-Year meetings.
- **Vacancies:** If a Chair vacancy occurs, the President selects a replacement, preferably from among current committee members. The ExComm retains the right to replace Chairs as needed.

5.1. Conflict of Interest Compliance

All Committee Chairs and members are bound by the Society's Conflict of Interest Policy [Section 3.5]. To ensure compliance, Committee Chairs are responsible for the following operational procedures during meetings:

1. **Agenda Review:** Every committee meeting must begin with a call for conflicts regarding specific agenda items.
2. **Mandatory Recusal:** Any member with a disclosed conflict regarding an award or grant nominee, vendor, or policy decision must recuse themselves from the discussion and the vote. If a Committee Chair is unsure if a conflict exists, or if a committee member refuses to recuse themselves, the issue must be paused and reported to the Ethics Committee via the Navex Platform immediately.
3. **Minutes:** The Chair or a designated scribe must record the disclosure and the recusal in the official meeting minutes.

5.1.1. Formation and Dissolution of Committees and Task Forces

To maintain organizational efficiency, existing Committees should be utilized whenever possible to manage new Society initiatives or programs. A new independent body should only be proposed if the scope of the initiative does not fall under the authority of an existing Committee. If a new concept or project is deemed outside the scope of current committees, the Executive Committee may authorize the formation of a Task Force. Ad hoc Task Forces may be formed to handle specific, short-term initiatives or projects, and dissolve once the specific goal is achieved. Task Forces may also be formed to investigate the necessity of a new permanent Committee and will:

- Define the proposed Committee's authority, duties, and responsibilities.
- Draft the handbook description.
- Recommend membership structures.

Approval Process. No Task Force or Committee may be formed without formal review and approval by the Executive Committee.

- **Vote:** Creation requires a majority vote of the Executive Committee during the Mid-Year or Annual Meeting, or via electronic communications as necessary to ensure timely action.

Dissolution Process. A permanent Committee may be dissolved if its established scope and duties are no longer required, have been fully absorbed by another body, or if the Committee remains inactive. No Committee may be formally dissolved without review and approval by the Executive Committee.

- **Vote:** Dissolution requires a majority vote of the Executive Committee during the Mid-Year or Annual Meeting, or via electronic communications as necessary to ensure timely action.

5.2. Society Operations Committees

5.2.1. Development Committee

Authority: Plans programs and manages issues related to donations and fundraising. All suggestions require ExComm approval before action.

Responsibilities:

- Evaluate existing development programs and initiate new goals.
- Identify new revenue sources and implement the annual fundraising plan.

5.2.2. Diversity, Equity, and Accessibility Committee

Authority: Fosters an inclusive environment; monitors accessibility; acts as an umbrella for diversity events at the Annual Meeting; recommends policy to promote inclusivity.

Membership: Must include at least one *ex officio* member from the **Student and Postdoctoral Liaison Committee** and the **Membership Committee**.

Responsibilities:

- Monitor DEI issues (in collaboration with the Membership Committee).
- Coordinate diversity events and facilitate scheduling.

- Participate in accessibility evaluation of Annual Meeting venue and provide an accessibility statement for program.
- Develop activities to increase diversity in vertebrate paleontology careers.
- Advise other standing committees on DEI matters.

5.2.3. Ethics Committee

Authority: The Ethics Committee has two primary functions:

1. Review (Confidential): Reviewing grievance reports, conducting ethics inquiries, and ensuring that candidates for elections and awards uphold ethics policies and bylaws.
2. Education: Developing best practices, workshops, and resources to promote ethical conduct within the discipline.

Membership & Structure: To ensure confidentiality and efficiency, the Committee is divided into two distinct functional groups under the leadership of a single Committee Chair.

I. Ethics Review Subcommittee (ERS) - The Confidential Core. This group is strictly limited to three voting members to ensure the highest level of confidentiality. Only these three individuals have access to confidential case files, complaints, and vetting data. The ERS meets on a biweekly basis to ensure timely completion of investigations.

ERS members serve three-year terms. Terms are staggered so that one new member is appointed every year to ensure operational continuity and maintain institutional knowledge. Incoming members join in a specialized expert role (Specimen & Research Ethics and Interpersonal Ethics). Committee members rotate the position of Ethics Committee Chair based on experience. This staggered structure guarantees that the committee is consistently anchored by two more experienced members, allowing incoming members ample time to gain experience and learn internal processes before assuming leadership responsibilities.

Members should not serve consecutive terms (though they may be reappointed in future years).

- **The Ethics Committee Chair** – should have previously been a member of the ERS, takes primary responsibility for ethics communication with ExComm and with sanctioned members. The Committee Chair is also responsible for maintaining the confidential historical record of Ethics actions [Section 3.6.11.] and for sharing sanctions as required with Senior Editor(s) of the Journal of Vertebrate Paleontology and the Program Committee Chair(s) [Section 3.6.6.].
- **Lead, Specimen & Research Ethics** - appointed for expertise in collections/research policy, conducts investigations of code of conduct violation in collaboration with other members of the ERS.

- **Lead, Interpersonal Ethics** - appointed for expertise in interpersonal ethics policy, conducts investigations of code of conduct violations in collaboration with other members of the ERS.

II. The Ethics Advisory Subcommittee (EAS) - The Educational Group. This group includes up to four committee members (based on workload) appointed by the chair. They do not have access to confidential investigation files. This group creates educational resources, conducts trainings and hosting workshops at the Annual Meeting, and suggests general Society policy for consideration by the Executive Committee. There are no term limits for EAS members.

Responsibilities:

- **The Ethics Review Subcommittee (Confidential Core)**
 - Maintain the highest level of confidentiality and follow the Ethics Procedures outlined in [Section 3.]
 - Receive and review all ethics complaints (via NAVEX)
 - Keep records up to date, including case notes and status on NAVEX
 - Conduct confidential investigations and report findings/recommendations directly to Executive Committee via Vice President (committee liaison)
 - Communicate sanctions to members found in violation of the Code of Conduct
 - Write and deliver the Transparency Report for the Annual Business Meeting
 - Monitor Self-Disclosure Forms to ensure suitability of candidates for society awards, grants, and volunteer roles (e.g., session moderator, field trip leader, committee members)
- **The Ethics Advisory Subcommittee (Educational Group)**
 - Organize ethics training and workshops at the Annual Meeting
 - In partnership with Ethics Committee Chair develop and maintain a brief training module and organize an annual online training session for SafeSVP designees two weeks prior to Annual Meeting.
 - Maintain and update training resources posted on the Society’s webpages
 - Advise the Executive Committee on general ethical trends and policy refinements
 - Develop a report on activities to be included in overall Ethics Committee report submitted by the chair twice annually.

5.2.4. Membership Committee

Authority: Increases individual membership, determines effectiveness of recruitment, and reviews member benefits.

Responsibilities:

- Handle requests for Emeritus membership and process new member applications with the Executive Director.
- Track membership trends/numbers and report to ExComm.

- Review member benefits and related web content.
- Serve as the review panel for the Jackson School of Geosciences Travel Grant and Honorary Membership awards.
- Propose creation or removal of membership categories.

5.2.5. Nominating Committee

Authority: Identifies and recruits qualified candidates for the annual ExComm elections.

Membership Specifics:

- **Composition:** The Chair (appointed by President) and two advisory members chosen by the Chair.
- **Eligibility:** Membership must include the Society's Past Presidents.
- **Restriction:** No current ExComm member may serve, other than the appointed Liaison.

Responsibilities:

- Solicit suggestions for open positions (aiming for at least two candidates per position).
- Evaluate candidates based on standard criteria and present ballots to ExComm for approval.
- Adhere to **Bylaws Article 3**.

5.3 Professional Practice and Education Committees

5.3.1. Collections and Repository Committee (CRC)

Authority: Addresses policy regarding curation, conservation, funding, and deaccessioning of specimens (including finding new repositories for orphaned collections).

Membership Specifics:

- **Cross-Liaisons:** Must include at least one member who also serves on the **Government Affairs Committee** and one who serves on the **Preparators Committee**.
- **External Representative:** One member should serve as the representative for the Society for the Preservation of Natural History Collections (SPNHC).
- **Diversity:** Must include a mix of collections managers, curators, and directors from diverse institutions (university, private, federal).

Responsibilities:

- Draft and maintain a "Best Practices" guide for collections.
- Liaise with the Government Affairs Committee and Executive Committee to suggest policy actions.
- Produce educational resources related to collections policy.

5.3.2. Education and Outreach Committee

Authority: Coordinates public activities regarding paleontology; develops programs on the importance of evolution; monitors challenges to science education.

Responsibilities:

- Coordinate educational outreach activities.
- Update relevant web content.
- Develop symposia, short courses, or publications (independently or with other associations).

5.3.3. Government Affairs Committee

Authority: Responds to government issues affecting the field (research, preservation, legislative goals) and fosters relationships with allied scientific organizations.

Membership: Include a mix of experts from diverse institutions (university, private, federal) and locations (representation from countries with fossil resources). Membership often include non-Society experts.

Responsibilities:

- Advise ExComm on press releases or official letters regarding government actions/commenting periods.
- Communicates with legislators, tribes, and government agencies to promote the Society's priorities for paleontological resource protection and access.
- Advise on issues related to illegal fossil sales or customs/import issues.
- Hold a meeting at the Annual Meeting to discuss current events.

5.3.4. Preparators Committee

Authority: Coordinates activities relevant to fossil preparation, including the preparation symposium/session and the demo table at the Annual Meeting.

Responsibilities:

- Manage the Preparators listserv.
- Provide preparator resources for members.
- Update relevant web content.
- Hold a joint meeting for the Committee and general Preparators at the Annual Meeting.

5.3.5. Student and Postdoctoral Liaison Committee

Authority: Organizes events to benefit Student and Postdoctoral members and maintains communication among this demographic.

Membership Specifics: The Chair must be a postdoctoral member.

Responsibilities:

- Annual review of web content and update in collaboration with Business Office.
- Organize student/postdoc focused events at the Annual Meeting.
- Participate in the informal Annual Meeting Planning Group (via Chair/representative) in months leading up to the conference.

5.4. Publications and Media Committees

5.4.1. Archives Committee

Authority: Documents the history of the Society. The Chair acts as the liaison between the Society and the Smithsonian Archives (repository).

Responsibilities:

- Compile, organize, and digitize Society archive materials.
- Transfer materials to the repository annually.
- Locate and archive historical documents.

5.4.2. Communications Committee

Authority: Facilitates internal (member) and external (press/public) communications to ensure visibility of Society initiatives. Manages social media with Executive Committee oversight.

Membership Specifics:

- **Leadership:** Two Co-Chairs appointed by the President.
- **Size:** 6 members.

Responsibilities:

- Investigate and implement new technology for website design, social media, and marketing.
- Coordinate messaging across platforms, including standardizing format and Society “branding” with ExComm approval.
- Review website content for regular updates.
- Moderate and post on Society social media channels weekly.
- Develop and post a regular Society newsletter
- Coordinate with other committees to maintain the Society's online presence.

5.4.3. Publications Committee

Authority: Oversees print and digital publications (*Journal of Vertebrate Paleontology*, Memoir series, etc.). Reviews submission policies and fees.

Membership Specifics:

- **Composition:** Two Senior Editors and general members appointed by them to support journal operations. Committee members are typically also on the Editorial Board.

Responsibilities:

- Coordinate manuscript review, editing, and illustration.
- Manage vendor services for the *Journal of Vertebrate Paleontology*.

5.5. Annual Meeting Committees

5.5.1. Auction Committee

Authority: Markets and implements the annual auction. Proceeds go to the Legacy League fund.

Responsibilities: Organize the auction event at the Annual Meeting.

5.5.2. Awards Committee

Authority: Solicits nominations and selects winners for Society awards.

Membership Specifics: A Chair (appointed by President) and the Chairs of each individual award panel.

Responsibilities:

- Identify and review applicants based on [Section 6.] guidelines.
- Submit recommendations to ExComm for approval prior to the mid-year meeting (Spring).
- Notify applicants by May of the meeting year.

5.5.3. Host Committee

Authority: Plans and implements the Annual Meeting in conjunction with the Business Office.

Membership Specifics: Host committees are selected 2+ years in advance based on city proposals. The Committee includes a Chair (or co-Chairs), and regular members affiliated with the host institution(s).

Responsibilities:

- Participate in the Annual Meeting Planning Group.
- Refer to Appendix 1 for detailed responsibilities.

5.5.4. Program Committee

Authority: The Program Committee is responsible for developing the scientific content of the Annual Meeting to ensure scientific excellence, organizational coherence, and financial viability. Decisions regarding the program structure are subject to Executive Committee approval.

Membership:

- **Composition:** A Chair (appointed by the President) and up to 12 members.
- **Terms:** The Chair serves a three-year, renewable term, reviewed by the Executive Committee.
- **Succession:** Future Chairs are typically recruited from current high-performing committee members to ensure continuity.

Duties and Responsibilities The Committee oversees the entire lifecycle of abstract management - from submission to presentation - and plans the comprehensive schedule of oral presentations, posters, and symposia.

Program Development:

- Recruit and review proposals for Symposia.
- Oversee the abstract review process, assigning submissions to reviewers by specialty (up to five reviewers per abstract) and monitoring deadlines.
- Determine acceptance/rejection of abstracts based on review data.
- Organize accepted abstracts into topical sessions to minimize conflicts, assign session moderators, and structure the daily schedule.

Logistics & Coordination:

- Consult with the Business Office on the floor plan to ensure adequate quality and quantity of space for talks and posters.
- Serve as the primary intermediary between the Business Office and members regarding submission issues.
- Coordinate with the Media Liaison regarding abstracts recommended for press interest.
- Participate in the informal Annual Meeting Planning Group via monthly conference calls leading up to the meeting.

Communications & Publications:

- Draft text for the call-for-papers, and accept/reject notifications.
- Identify abstracts requiring significant editing (e.g., formatting, language issues) and coordinate with abstract editors.
- Proofread the final Abstract Volume (program content, room numbers, moderators) prior to publication.

Reporting:

- Provide mid-year and annual reports to the Executive Committee.
- Advise the Executive Committee on the balance between general scientific sessions and special requests (e.g., Education & Outreach, Conservation, Plenary speakers).

6. Society Activities

The committees and governance entities defined in the preceding sections are established to operationalize the Society's mission. While those groups provide oversight and strategic direction, the specific programs they administer constitute the core value delivered to the membership. This section details the primary vehicles through which the Society disseminates knowledge and fosters community: the Annual Meeting and the Society's publication.

6.1 Annual Meeting

6.1.1 Annual Meeting Site Selection. The Society strives to schedule meetings at least two years in advance.

- **Process:** Prospective Host Committees should review the host duties and responsibilities (see Appendix 1). Interested parties should contact the Business Office as early as possible.
- **Venue Scouting:** The Business Office meeting planners will explore potential venues in coordination with the Host Committee. Prospective hosts are strongly encouraged to engage their local Convention Bureau or Conference Planning Board to assist the Business Office in identifying venues, hotels, potential local grant funding, and local sponsorships.

6.1.2. Meeting Management and Marketing

- **Marketing:** Promotion of the Annual Meeting is executed by the contracted Business Office, and with active support and participation from the Host and Communications Committees.
- **Sponsorship and Exhibitors:** The Business Office is responsible for soliciting sponsors and exhibitors, supported by the Host Committee. All fees collected from exhibits and sponsorships are accounted for in the meeting budget to offset operational expenses.
- **Planning Meetings:** The Business Office provides the Host Committee with a schedule of required tasks and organizes regular meetings to assist with planning.

6.1.3. Scientific Program: The Scientific Program constitutes the core of the Annual Meeting. The content and structure of the program should adhere to the historical template that has proven successful for the Society, ensuring sessions remain relevant to the membership.

- **Authority:** The **Program Committee** [Section 5.5.4.] maintains ultimate authority over all material presented in the annual program.
- **Abstracts:** Abstracts are submitted annually via an online system provided by the Business Office. The submission window typically runs from April to June. The Program Committee retains final authority regarding the review and selection of abstracts for inclusion.

6.1.4. Field Trips and Workshops: Proposals for field trips and workshops are accepted annually from the membership. These proposals are solicited and collected by the Host Committee, which reviews and approves them in consultation with the Executive Committee and Business Office. Field trips and workshops must be self-sustaining. Leaders must explicitly state a suggested fee in the proposal to cover all direct costs:

- **Administrative Fee:** A fee of \$5.00 per person is added to the proposed participant fee to cover Society administrative costs.
- **Inclusions:**
 - **Field Trips:** Proposals must cover transportation, food, admission fees, and reimbursable supplies.
 - **Workshops:** Proposals must cover AV, internet expenses, and reimbursable supplies.
- **Venue Costs:** Room rental for workshops is provided complimentary by the Society only if the space is available within the existing ratified meeting venue contract. If additional space or time is required outside the contract, the expense must be covered by the workshop attendee registration fee.

6.1.4.1. Reimbursements and Revenue. All expenses are funded via attendee registration fees.

- **Process:** Reimbursements for valid expenses (transportation, admissions, food, supplies) will be processed after the meeting. Requests must be accompanied by original receipts.
- **Limits:** The total reimbursement may not exceed the total fees collected for the specific event (minus the administrative fee).
- **Surplus:** Any excess registration fees not utilized for vendor services or reimbursable expenses will be retained by the Society to support the Annual Meeting.

6.1.4.2 Compensation. Field trip and workshop leaders serve on a volunteer basis and may not receive payment or honoraria for their time.

6.1.5. Annual Student Round Table Forum. This event demonstrates the Society's commitment to its student members by providing a dedicated forum for networking and education.

- **Organization:** The **Student and Postdoctoral Liaison Committee** organizes the event, including the selection of roundtable topics, invitations to Society members to host tables, and the management of the event.
- **Refreshments:** Subject to budget availability, the Society will provide light snacks and beverages (e.g., limited beer/soda) for this event.

6.1.6. Volunteer Policy. The Host Committee is responsible for organizing volunteers to staff essential meeting functions, such as registration desk services and bag stuffing.

6.1.6.1. Complimentary Registration The Society provides a limited number of complimentary Annual Meeting registrations to volunteers fulfilling the operational needs of the meeting.

- **Eligibility:** To qualify, a volunteer must agree to provide a minimum of **12 hours of service** onsite during the conference.
- **Cap:** The total number of complimentary registrations is determined by the staffing needs defined by the meeting manager but is **not to exceed 10 total registrations**.
- **Scope:** Complimentary registration includes standard meeting concessions but does not include ticketed events or other functions unless specified.
- **Allocations:** These registrations are typically used to reward students or local amateurs staffing the reception desk.

6.2 Society Publications

The *Journal of Vertebrate Paleontology* (JVP) serves as the official publication of the Society.

6.2.1. Editorial Authority and Governance The Senior Editors function as the Chief Executive Officers for the Society's publication. They supervise all activities of the Journal and serve as the Chairs of the Publications Committee. They are responsible for reporting violations via the Navex platform if an author violates the [Taylor & Francis Editorial Policies](#) and/or the SVP Code of Conduct. They are also responsible for enforcing sanctions, and for maintaining confidentiality around ethics violations and/or sanctions.

- **Appointment:** Two Senior Editors are appointed by the President with the approval of the Executive Committee.
- **Term of Office:** Each Senior Editor serves a four-year term. Terms are staggered so that one editor is appointed every two years to ensure continuity of operations. Multiple, consecutive terms are permitted.
- **Reporting:** The Senior Editors report on Journal activities to the Executive Committee at the spring and fall meetings.

6.2.2. Editorial Responsibilities

Senior Editors (2) The Senior Editors hold primary responsibility for the scientific and editorial content of the Journal. Their specific duties include:

- Acting as the official liaison to the publisher.
- Advising the President regarding the publishing contract.
- Appointing volunteer staff (with Executive Committee approval), including the Managing Editor, Technical Editors, Phylogenetics Editor, Memoirs Editor, Book Review Editor, and the Editorial Board.
- Providing input on the yearly publications budget.
- Ensure that sanctions are upheld as required by Ethics Policy and kept confidential.
- Responsible for reporting via the Navex platform if an author violates the [Taylor & Francis Editorial Policies](#) and/or the SVP Code of Conduct.
- Nominate papers for the Taylor & Francis Award [**Section 7.1.11.**]

Managing Editor (1) The Managing Editor is responsible for the final quality assurance of print proofs. Upon receiving the first print proof, the Managing Editor ensures:

- **Format Compliance:** Ensure the manuscript adheres to strict Journal specifications, specifically:
 - Title page formatting.
 - Hierarchy of headings and section spacing.
 - Systematic Paleontology formatting (including synonymies).
 - Literature Cited consistency.
 - Figure and figure caption formatting.
- **Technical Compliance:** Verify that figure files meet current specifications and that the Zoobank registration number, Morphobank and/or Morphosource links are included where relevant.
- **Copyright Transfer:** Once the printed issue is completed, the managing editor verifies that the author has completed the copyright transfer of the cover image.

Staff Editors (2)

Technical Editors (2) Technical editors ensure that incoming manuscripts comply with the Journal of Vertebrate Paleontology formatting guidelines, make notes to the author about necessary modifications to bring the manuscript into compliance, and assign the manuscript to a Senior Editor.

Memoir Editor (1) The Memoir Editor works exclusively with Memoir submissions.

Associate Editors (unlimited) Associate Editors are disciplinary experts, handle manuscripts, and interact with authors and reviewers.

Phylogenetic Editors (2) Phylogenetic Editors ensure the phylogenetic analyses are reproduceable, that all necessary data files are included, and that correct phylogenetic procedures are followed.

Nomenclature Editor (1) The Nomenclature Editor reviews any manuscript that incorporates complex nomenclatural acts to ensure ICZN process is followed.

Language Editors (2-3) Language Editors edit any author's manuscript for English grammar and spelling, a free service provided to authors who request it.

6.2.3. Editorial Stipend Policy The Society receives editorial staff support funds from the contracted publisher annually (adjusted for CPI).

- **Retained Funds:** The Society retains **\$6,000** of this support annually to cover the Editorial Board meal at the Annual Meeting. Any unused portion of this retained amount

may be used to support editors from middle HDI or developing countries to attend the conference.

- **Stipends:** The remaining funds provided by the publisher are distributed as stipends to the volunteer editors according to the following percentages:
 - **Senior Editors (2):** 30% each
 - **Managing Editor (1):** 12%
 - **Technical Editors (4):** 7% each
 - **Memoirs Editor (1):** 7%

6.2.4. Copyright and Permissions The Society maintains specific guidelines regarding the reproduction of material published in the *Journal of Vertebrate Paleontology*.

Automatic Permissions (No Request Necessary) Permission is automatically granted for the following uses:

- **Authors:** Replicating their own work, regardless of venue.
- **Non-Profit:** Authors republishing copyrighted material in publications owned by not-for-profit organizations.
- **Educational:** Students republishing their work for educational purposes (e.g., theses, dissertations).
- **Abstracts:** Republication of the abstract only.

Permissions Required (via Copyright Clearance Center) Anyone interested in the following uses must obtain permission through the Copyright Clearance Center:

- **Commercial Use:** Republication of copyrighted material by a non-author in publications owned by for-profit companies.
- **Full Republication:** Republishing an entire article (except in theses/dissertations as noted above).
- **Digital Posting:** Posting an electronic article to a website other than the Journal's official site.

7. Awards, Grants, and Recognition

The Society maintains a robust awards program to recognize excellence at all career stages.

- **Funding:** Award and grant amounts are recommended annually by the Treasurer to the Executive Committee, based on the performance of specific award funds and the Investment Policy. Current amounts are published on the Society website.
- **Frequency:** Unless otherwise stipulated in specific award guidelines, an individual may not receive the same Society award more than once.
- **Disbursement:** Monetary grants and awards are distributed through the Society Business Office.

7.1. Student Awards and Grants

The following awards are restricted to student members of the Society.

7.1.1. The Steven Cohen Award for Student Research

Purpose: To foster excellent student research in vertebrate paleontology. Funds may support field, museum, or laboratory research. Priority is given to innovative, unpredictable, or unusual research with direct application to understanding and interpreting the fossil record.

Eligibility: Open to current graduate students. Applicants must be current Society members. Immediate past winners are ineligible.

Application: submitted via the online award submission system. The following are required:

- Must include a title and description of the proposed research (maximum 3 double-spaced pages).
- Description must include goals, objectives, methods, a major category budget, and timeline for the planned research.
- A written personal statement of how the award would contribute to the success of the proposed research (500 character limit)
- Two letters of recommendation that directly address the exemplary academic qualifications of the student and that of the proposed research. At least one letter must be from a sponsor at the institution where the student is currently enrolled in a graduate program; this letter writer must verify the applicant's graduate student status.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website, minimum award is \$1000 USD.

7.1.2. The Edwin H. and Margaret M. Colbert Prize

Purpose: Recognizes an outstanding student poster presentation at the Annual Meeting. The prize was named in honor of the Colberts' contributions to vertebrate paleontology.

Eligibility: Open to graduate students (and exceptional undergraduates) who are the single author of a poster. One submission per year is allowed. Applicants must be current Society members. Previous winners are ineligible.

Application and Selection Process: applicants indicate interest via the abstract submission system:

- Students must present their academic institutional affiliation in the title bar of their poster.
- Posters under consideration will be indicated by a special designation.

- Preliminary judging will occur after poster set-up time, but prior to the regular poster session (without presenters present).
- The panel will select five finalists based on layout and content (equally weighted).
- Finalists are interviewed by panel members during the regular poster session to evaluate knowledge of the material.
- The winner is announced at the Awards Banquet.

Award: A stipend as listed on the SVP website.

7.1.3. The Mary R. Dawson Predoctoral Fellowship

Purpose: Recognizes research excellence and promotes a successful career by supporting dissertation research travel, data collection, and analyses. Priority is given to applicants who demonstrate the exceptional scholarship as evidenced by the proposed project, excellence in student professional activities and leadership, and promise of a productive and important and professional role in vertebrate paleontology.

Eligibility: Open to Ph.D. candidates (qualifying exam completed or equivalent). Applicants must be current Society members.

Application: submitted via the online award submission system. The following are required:

- Must include a detailed dissertation project description (maximum 3 single-spaced pages)
- Description must include title, hypotheses to test and proposed methods, the intellectual merit of the research and its broader relevance to advancing the field of vertebrate paleontology, an outline of the organization of research, the timetable, and logistics of the proposed project. budget and justification, CV, advisor letter confirming candidacy,
- Budget and Justification document (maximum 1 page), including a breakdown of how the award would be used, including travel expenses, permit costs, professional expenses, supplies, and additional expenses. Include a list of other research support (current and pending).
- A curriculum vitae
- Literature Cited
- Two letters of support that directly address the exemplary academic qualifications of the student and that of the proposed research. At least one letter must be from the advisor at the institution where the student is currently enrolled in a graduate program; this letter writer must verify the applicant's graduate student status.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website.

7.1.4. The Richard Estes Memorial Grant

Purpose: To enhance graduate research in Synapsida/Pan-Mammalia vertebrate paleontology, with emphasis on systematics, morphology, biogeography, and/or paleoecology. Projects involving one-time field activities are encouraged.

Eligibility: Open to current graduate students. Applicants must be current Society members.

Application: submitted via the online award submission system. The following are required:

- Must include a project description (maximum 3 single-spaced pages).
- Project Description must include the hypotheses, broader relevance to vertebrate paleontology, a brief outline of the timetable and logistics of the proposed project. Applicants must state the likely completion date for the project.
- Budget and Justification document (maximum 1 page), including a breakdown of travel and living expenses, permit and material costs, and additional expenses. Include a list of other research support (current and pending).
- One letter of support from the project advisor or major professor at the institution where the student is currently enrolled in a graduate program.
- A recent photo of the applicant.

Award: Stipend as listed on the SVP website.

7.1.5. The SVP FUTURES Award

Purpose: Provides support for a research experience for undergraduate students from underrepresented groups. The award can be used to support travel to and room/board at a research site, research expenses, and a stipend for the student during a regularly scheduled break from classes (8-10 weeks).

Restrictions: The award may not be used to support field school or similar experiential courses required by the applicant's degree program. All funds must be spent on the proposed project within two years of the award. Upon completion of the project, the awardee is encouraged to apply for a Jackson School of Geosciences Student Travel Grant and is required to present their results at the Annual Meeting (as a primary author or co-author). Applicants acknowledge that SVP is not responsible for ensuring the cost of the proposed experience fits with the award amount. Applicants must ensure that they have sufficient funds, whether through the FUTURES Award or in combination with other funding sources.

Eligibility:

- Applicants must be undergraduate students who are not graduating in the current year.
- Restricted to students from racial or ethnic groups underrepresented in vertebrate paleontology due to historical discrimination (specifically Black, Indigenous, and Latinx students, or mixed-race students).

- *Note:* Applicants are not asked to describe their racial or ethnic background in the application, but by applying for this award they are verifying that they are from a group that is underrepresented in the field of vertebrate paleontology. Intentional misrepresentation of identity may result in revocation of the grant and temporary bans from Society meetings.

Application: submitted online via the online award submission system. The following are required:

- A cover sheet providing educational background.
- A personal statement that addresses motivations for applying and their desired outcomes if selected.
- An unofficial transcript or list of courses taken (without a GPA – GPAs and grades are not considered).
- A letter of support from their intended research mentor (Addendum 2) OR a statement on the student’s geographic and/or travel restrictions that will help the committee identify a potential mentor for local (or remote) work.
- A recent photo of the applicant.
- Completion of an anonymous demographic survey.

Mentorship Structure: Students may name a specific mentor in their application, and the selection committee will take this individual’s mentorship record into account. Alternatively, a student may not have a specific mentor in mind. If this is the case, the award panel will match the applicant with a vetted volunteer mentor. The Society is not responsible for the mentor-mentee interaction following the match. The grant is awarded to the student, and the student must have an active role in leading the project. Applications are reviewed equally regardless of whether a mentor is indicated or assigned.

Award: Stipend as listed on the SVP website.

7.1.6. Jackson School of Geosciences Travel Grant

Purpose: To encourage student participation in the Annual Meeting.

Eligibility: Open to undergraduate and graduate students currently enrolled in an academic institution. Applicants must be the first author on a submitted abstract (applications are received before abstract acceptances are announced). Previous grantees are ineligible. Applicants must be current Society members.

Application: Submitted via the award system prior to abstract acceptance. The following are required:

- Submitted abstract title and authorship information.

- A personal statement (maximum 1 page double-spaced) describing the ways in which attending the Annual Meeting would contribute to their academic program.
- A detailed financial statement about other funding to support Annual Meeting attendance.

Award: Stipend amount is calculated based on the recipient's geographic distance from the meeting location, as listed on the SVP website.

7.1.7. The Everett H. Lindsay Paleomammalogy Award

Purpose: To fund creative graduate student field or laboratory research into the evolution of mammals, broadly construed. The Everett H. Lindsay Paleomammalogy Award may support the investigation of mammalian fossils or the deposits in which they occur, including novel approaches in anatomy, function, chronology, paleoenvironments and paleoecology and/or modeling. The study – geological, biological, or behavioral – should be related to mammal evolution.

Eligibility: Open to current graduate students. Applicants must be current Society members. Past winners are ineligible.

Application: submitted via the online award submission system. The following are required:

- Must include a title and project description (maximum 3 double-spaced pages).
- The project description must include an anticipated timetable, results of already completed research, methods, and a major category budget.
- A personal statement describing the ways in which the Award will contribute to the project's success.
- Two letters of support. At least one letter must be from the advisor at the institution where the student is currently enrolled in a graduate program; this letter writer must verify the applicant's graduate student status.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website.

7.1.8. The Bryan Patterson Memorial Grant

Purpose: The Dr. Bryan Patterson Memorial Grant supports student fieldwork in vertebrate paleontology. Particular consideration is given to proposals that are innovative rather than routine, venturesome rather than predictable, unusual rather than run-of-the-mill.

Eligibility: Open to current undergraduate and graduate students. Applicants and their sponsors must be current Society members.

Application: submitted via the online award submission system. The following are required:

- Project description that includes a title and a statement that describes how the grant will contribute to the success of planned fieldwork (maximum 3 double-spaced pages).
- Project budget covering major categories.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website.

7.1.9. The Alfred S. Romer Prize

Purpose: The Alfred S. Romer Prize Recognizes an outstanding scientific contribution in vertebrate paleontology by a predoctoral student based on an oral presentation at the Annual Meeting.

Eligibility: Open to predoctoral students (including undergraduates and those who have held a doctoral degree for less than one year). Previous winners and previously published abstracts are ineligible. Only single-authored abstracts are considered.

Application Process: applicants indicate interest via the abstract submission system:

- A signed cover letter (PDF format) that states the student's current degree program, estimated date of completion, and institution, as well as a list of all undergraduate and graduate degrees previously awarded, degree dates, and awarding institutions, and a statement of the current position held and institution (if applicant is in the first year post-degree).

Selection Process: Applicant's work must be integral to vertebrate paleontology with direct applications or relevance to understanding and interpreting the fossil record, particularly for projects describing new methods developed from living organisms and/or actualistic studies. The work should present a complete, comprehensive study including sufficient background and information on methods for the evaluation of the significance and suitability of the research and methods.

- Finalists will be selected from submitted abstracts to present in the Romer Prize Session at the Annual Meeting.
- Those not selected may withdraw their abstract or ask the Program Committee to review it for regular session consideration.
- The winner is selected from finalists on site and announced at the Awards Banquet.

Award: A stipend as listed on the SVP website.

7.1.10. The Albert E. Wood Award

Purpose: The Albert E. Wood Award supports student research that involves museum and university vertebrate and/or natural history collections, with special consideration given to proposals that greatly enhance the value of fossil material already deposited in collections.

Eligibility: Open to current undergraduate and graduate students. Applicants (and sponsors) must be current Society members.

Application: submitted via the online award submission system. The following are required:

- Project description (750 character limit).
- Personal Statement describing the ways in which the Award will contribute to the success of the proposed collections-based work (500 character limit).
- Budget with major categories.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website.

7.1.11. Taylor & Francis Award

Purpose: An annual award for the best student first-authored paper published in the *Journal of Vertebrate Paleontology*. This award is funded by Taylor & Francis, publisher of the *Journal of Vertebrate Paleontology*, and given to a paper published in the previous calendar year.

Eligibility: Open to current undergraduate and graduate students who are the first-author on a paper. Recent graduates are also eligible as long as the manuscript was submitted no more than 18 months after the degree was awarded. Research is not required to be restricted to student's graduate work. Papers in "early view" are ineligible and must be considered in the following calendar year. Award winners must be current Society members.

Application: Applicants utilize the submission system for the *Journal of Vertebrate Paleontology*. Student first-authors indicate during submission that the work qualifies for consideration.

Selection: The *Journal of Vertebrate Paleontology* Senior Editors nominate papers for consideration by the award panel. If selected for consideration, the contribution of each author must be stated in writing. Criteria for selection include:

- Quality/originality of research
- Importance to immediate community (e.g., fish, mammal, dinosaur workers)
- importance to the broader vertebrate paleontology community
- potential for public engagement, as indicated by the quality of the plain language summary
- Potential for paper to generate future research

Award: Includes a First Place and Second Place winner. Award amounts as listed on the SVP website.

7.2. Professional Training Awards and Grants

7.2.1. Excellence in Education and Outreach Award

Purpose: To celebrate achievement in formal or informal education or outreach, based on either a poster or a talk at the SVP Annual Meeting.

Eligibility: All oral and poster abstract presentations featured in the Paleontological Practices - Education & Outreach Session are automatically entered into the competition for this award.

Application and Selection Process: applicants indicate interest via the abstract submission system (select the Paleontological Practices – Education & Outreach presentation category). A subcommittee of the SVP Education and Outreach Committee will determine the winner during the Annual Meeting.

Award: The winner will be recognized during the Awards Banquet at the SVP Annual Meeting.

7.2.2. The Jon C. Graff International Paleontology Award

Purpose: To promote opportunities for scientists from nations with developing economies to present research at the Annual Meeting by funding travel expenses.

Eligibility:

- Citizenship and current residence in an economically disadvantaged nation ([UN HDI index](#) <0.75).
- Applicant must be the first author on a submitted abstract.

Application and Selection Process: applicants indicate interest via the abstract submission system. Required materials include:

- An abstract (title limited to 255 characters, body limited to 2,200 characters). If an abstract contains a citation, reference, figure, caption or ad hominem statement, it will be automatically declined. Please review carefully.
- A description of how the opportunity to present research at SVP will enhance the recipient's career goals in Vertebrate Paleontology.

Award: Reimbursement for travel and accommodation costs up to the stipend amount posted on the SVP website. Awardee(s) are also given a complimentary meeting registration and a 3-year membership to the Society with online journal access.

7.2.3. The Marvin and Beth Hix Preparator's Grant

Purpose: The Marvin and Beth Hix Preparator's Grant is intended to further the field of vertebrate paleontology through the advancement of preparation and the study of materials and methods used to reveal and preserve fossil information. The grant primarily funds travel expenses to learn and teach preparation.

Eligibility: Preference is given to applicants for training apprenticeships and workshops. Grant recipients must be current Society members.

Application: submitted via the online award submission system. The following are required:

- Project description including goals, objectives, relevant logistics, and timetable (maximum 3 double-spaced pages).
- A budget that includes travel, living, supply, and additional expenses. The budget should disclose other funding in support of this project.
- Curriculum vitae including preparation and training experience.
- Three letters of support (with full contact info of letter writers). If the application is for preparation training, a letter of support from the trainer and one from the trainer's supervisor must be included.
- Additional project personnel contact information and curriculum vitae.
- A recent photo of the applicant.

Award: A stipend as listed on the SVP website.

7.2.4. The John J. Lanzendorf-National Geographic PaleoArt Prize

Purpose: The John J. Lanzendorf-National Geographic PaleoArt Prize recognizes outstanding achievement in paleontological scientific illustration and naturalistic art. It is the scientific community's exclusive award for outstanding paleontological visualization. It recognizes PaleoArt - the scientific or naturalistic rendering of subject matter pertaining to vertebrate fossils – as a critical vehicle for communicating discoveries and data among researchers and the public.

Categories: The prize recognizes four categories:

- **Scientific Illustration:** Text-figures or supplementary material published in (or prepared for) a research paper. *Submission must cite the associated publication.*
- **2-Dimensional Art:** 2D works *not* intended as scientific text-figures or supplementary data.
- **3-Dimensional Art:** Physical 3D works (e.g., sculptures)
- **Digital Modeling and Animation:** Digital 3D works, including animations published in (or prepared for) a research paper. *Submission must cite the associated publication.*

Eligibility: Nominees are not required to be members of the Society. Maximum of two (2) entries per artist/studio. Open to all vertebrate groups. Works must have been completed within the last two years and not previously submitted to this prize.

Application: submitted via the online award submission system. The following are required for submissions:

- **2D, 3D, and Scientific Illustration:** Title of the work, one image (.jpeg format, maximum 1.5 MB)
- **Digital Modeling and Animation:** Title of the work, one still image representative of the work (.jpeg format, maximum 1.5 MB), One (1) animation clip of < 30 seconds plus one second of playback for title, artists, contact information, and credit. YouTube link for full video submission.

Award: A stipend as listed on the SVP website.

7.2.5. The SVP Field Training Award

Purpose: The SVP Field Training Award honors all individuals who have contributed to field programs and the preparation of fossils, providing the data that drive our profession and understanding of past environments and life. The award reflects the Society's mission to support and encourage the discovery, conservation, and protection of vertebrate fossils and fossil sites. Funding will support field training for students, early career paleontologists, preparators, land managers, and others in vertebrate paleontology-related positions with responsibilities for paleontological resources who can demonstrate a need for field training in their professional development.

Eligibility: Applicants who demonstrate a need for field training (minimum one week preferred). Applicants must identify a field mentor, and should work with the mentor to deliver a realistic training proposal. Both applicant and mentor must be Society members. Previous awardees are ineligible.

Application: submitted via the online award submission system. The following are required:

- Project description including summary of techniques in which the applicant will be trained (maximum 1 page double-spaced).
- Personal statement describing how the award will advance the applicant's field skills and professional development and/or career aspirations in vertebrate paleontology (maximum 1 page double-spaced)
- A budget
- CV (maximum 2 pages)
- Mentor: CV (maximum 2 pages) and a signed Certificate of Responsible Stewardship (Addendum 3).

Mentor Matching: The Award Committee may assist in matching applicants with potential mentors if none are identified by the applicant. A call to membership will be issued when the awards applications open each year; potential mentors can add their data to this [form](#).

Award: A stipend as listed on the SVP website.

7.3 Society Awards Requiring Nomination

Awards that honor achievement in the field of vertebrate paleontology and exceptional service to the Society. These awards require nomination by Society members. Unless a committee specifically requests it, Executive Committee members are exempt from providing nominations for these awards. Executive Committee members may write letters in support of a nomination.

7.3.1. The Robert Lynn Carroll Award

Purpose: The Robert Lynn Carroll Award recognizes scholarly excellence in the discipline of vertebrate paleontology by an early to mid-career researcher. The award is named in honor of Robert Carroll's impact on vertebrate paleontology and evolution.

Eligibility: Nominees must have no more than 15 years of full-time experience after completing their doctorate or equivalent degree (excluding parental or other leave, but not excluding time outside of the profession). The nominee must be a member of the Society.

Nomination: Submitted via the online award submission system. Nominations must include:

- A formal letter of nomination
- At least two letters in support of the nomination. Each letter must include the contact information of the letter writer.
- Nominating and supporting letters should explain how the nominee fits the criteria of the award, emphasizing their contributions to vertebrate paleontology thus far in their career.
- The nominee's curriculum vitae minimally including education, professional experience, research overview, professional service, and publications. Any career breaks should also be indicated.

Selection: If no nominations are received, the panel may consider nominees from the past years. In this case, the panel chair will contact past nominators to reactivate and/or update their nomination file. The chair must keep track of nominations and transmit this information and related files to future chairs. The panel and/or Executive Committee may also generate nominations internally.

Award: Stipend as listed on the SVP website.

7.3.2. The Joseph T. Gregory Award

Purpose: The Joseph T. Gregory Award honors outstanding service to the welfare of the Society.

Eligibility: Nominees are not required to be members of the Society.

Nomination: Submitted directly to the Award Chair. Nominations must include:

- A formal letter of nomination
- The names of at least one, and up to three colleagues willing to provide support letters if requested
- A recent photo of the nominee and a brief (300-500 word) biography.

Selection: If no nominations are received, the panel may consider nominees from the past year. In this case, the panel chair will contact past nominators to reactivate and/or update their nomination file. The chair must keep track of nominations and transmit this information and related files to future chairs. The panel and/or Executive Committee may also generate nominations internally.

Award: The winner receives complimentary registration to the Annual Meeting, banquet tickets

7.3.3. Honorary Member

Purpose: Honorary membership recognizes distinguished contributions to the field of vertebrate paleontology.

Eligibility: Nominees are not required to be members of the Society. Up to two honorees are named each year.

Nomination: Submitted via the online award submission system. Nominations must include:

- A formal letter of nomination
- Three additional letters of support that bear the contact information of the letter writer. All letters of support should be compiled into one electronic file.
- Curriculum vitae of the nominee
- All documents should be compiled into one electronic file for submission.
- Recent photo of nominee

Award: Lifetime membership in the Society. Plaque presented at the Annual Meeting banquet. See description of Honorary Lifetime Member [Section 2.1.6.] for a list of member benefits. No other travel, registration, or other stipend is provided.

7.3.4. A. S. Romer – G. G. Simpson Medal

Purpose: The A. S. Romer – G. G. Simpson Medal is the Society’s highest honor. It is awarded for sustained and outstanding scholarly excellence in the discipline of vertebrate paleontology.

Eligibility: Nominees are not required to be members of the Society. Nominees may include vertebrate paleontologists who have made outstanding and sustained contributions to the field from mid and senior career levels.

Nomination: Nominations are submitted directly to the Chair of this award committee. Nominations must include:

- A formal letter of nomination
- At least two letters of support, each bearing the contact information of the letter writer.
- Nominating and supporting letters must explain how the nominee fits the criteria for the award, emphasizing the nominee’s contributions to vertebrate paleontology over the span of their career.
- Curriculum vitae of the nominee
- All documents should be compiled into one electronic file for submission

Selection: The review panel may consider nominees from the past year if there is a lack of current year nominees. In this case, the panel chair will contact past nominators to reactivate and/or update their nomination file. The Chair must keep track of nominations and transmit this information and related files to future chairs. If no nominees are received by the application deadline the panel may develop their own nominations for submission to the Executive Committee for approval. The Executive Committee may also generate nominations internally.

Award: The awardee receives a medal at the Annual Meeting banquet, complimentary registration to the Annual Meeting including banquet tickets, and travel and accommodations reimbursed up to \$3,000 USD based on submitted receipts. The awardee is also invited to give a brief (10-15 minute) speech during the award ceremony.

7.3.5. Morris F. Skinner Award

Purpose: The Morris F. Skinner Award honors outstanding and sustained contributions to scientific knowledge through the making of important collections of fossil vertebrates. It shall be awarded to those persons who encourage, train, or teach others toward the same pursuits.

Eligibility: Nominees are not required to be members of the Society.

Nomination: Nominations are submitted directly to the Chair of this award committee. Nominations must include:

- A formal letter of nomination

- At least two, and not more than four (4) letters of support, each bearing the contact information of the letter writer.
- All documents should be compiled into one electronic file for submission
- Nominating and supporting letters must explain how the nominee fits the criteria for the award, emphasizing the nominee’s contributions to vertebrate paleontology over the span of their career.

Selection: The review panel may consider nominees from the past three years if there is a lack of current year nominees. In this case, the panel chair will contact past nominators to reactivate and/or update their nomination file. The Chair must keep track of nominations and transmit this information and related files to future chairs. If no nominees are received by the application deadline the panel may develop their own nominations for submission to the Executive Committee for approval. The Executive Committee may also generate nominations internally.

Award: The awardee receives a plaque at the Annual Meeting banquet, complimentary registration including banquet tickets, and a stipend as listed on the SVP website.

8. Society Finances and Investment Policies

8.1 Investment Policy Statement (IPS)

Purpose: The IPS guides the Executive Committee and Financial Guidance Committee (FGC) in supervising the Society’s Investment Portfolio. It establishes:

- Attitudes, expectations, objectives, and guidelines for the investment of SVP’s assets.
- Understanding of investment goals and objectives for each fund in the SVP portfolio.
- Guidelines for effective communication between ExComm and all parties involved with investment management decisions.
- Formal criteria to select, monitor, evaluate, and compare the performance results achieved by each investment option on a regular basis.

Fiduciary Standard: All assets, including restricted funds, are treated as if held by SVP in a fiduciary capacity to accomplish its mission. Investment standards adhere to those of a prudent investor under applicable state laws.

8.2 Fund Structure

SVP maintains two primary categories of funds: Short-Term (Operating) and Long-Term (Legacy League).

8.2.1 Short-Term Funds (Operating Account). The operating account is designed for the normal liquidity associated with the SVP assets. Currently, SVP has a designated checking account for its short term assets. Funds available for short-term investments are to be invested as follows:

- U. S. Government Guaranteed Investments
- Commercial Paper (double rated A-I, Prime-I)
- Bank or Trust Company pools
- Bank Certificates of Deposit (CDs)

8.2.2 Long Term Funds (Legacy League). The Legacy League Fund serves as the consolidated investment vehicle for the Society’s reserves and awards. To maximize investment efficiency, all long-term funds – both restricted and unrestricted – are pooled within the Legacy League account. While pooled for investment, restricted funds (e.g., named Awards) are tracked separately in the Society’s financial records to ensure strict adherence to donor stipulations.

- **Legacy League Fund:** Unrestricted funds.
- **Student Awards:** Cohen, Colbert, Dawson, Estes, FUTURES, Jackson School of Geosciences, Lindsay, Patterson, Romer, Wood
- **Other Awards:** Graff, Carroll, Field Training, Hix, Lanzendorf-National Geographic Paleoart, Skinner.
- **New Funds:** as detailed in [Section 9], new restricted named funds require a minimum corpus of \$50,000 USD to be fully funded within five years. Funds failing to meet this threshold revert to unrestricted status.

8.2.3 Sources of Funds & Liquidation

- **Donations:** The Society accepts monetary gifts and securities.
- **Securities Policy:** To minimize market risk, all donated stock and securities are liquidated immediately upon receipt. The cash proceeds are then invested according to the asset allocation targets below.

8.3 Investment Objectives and Guidelines for Legacy League Fund (Long Term Portfolio)

- **Time Horizon:** investment guidelines are based upon an investment horizon of > 5 years.
- **Risk Tolerance:** Moderate. Interim market fluctuations to achieve long-term growth are acceptable.
- **Primary Objective:** Long-term growth that preserves capital, enhances purchasing power against inflation, and maximizes return within prudent risk levels.
- **Performance Goal:** Long term growth. Target an annual return that exceeds the benchmark return over a full market cycle.

8.3.1. Asset Class Guidelines. The Financial Guidance Committee believes long term investment performance, in large part, is a function of asset class mix. The Financial Guidance Committee

has reviewed the long term performance characteristics of the broad asset classes, focusing on balancing the risks and rewards. While interest generating investments, such as bonds, have the advantage of relative stability of principal value, they provide little opportunity for real long term capital growth due to their susceptibility to inflation. Equity investments, such as common stocks, clearly have a significantly higher expected return but have the disadvantage of much greater year by year variability of return. From an investment decision making point of view, this year by year variability may be worth accepting when SVP’s long time horizon for investment management is considered.

8.3.2. Asset Allocation. The portfolio is rebalanced at least quarterly if assets fall outside policy ranges.

Asset Class	Minimum	Target	Maximum
Equity Investments	35.00%	50.00%	65.00%
Alternative Investments*	10.00%	20.00%	30.00%
Fixed Income	15.00%	25.00%	45.00%
Cash	0.00%	5.00%	10.00%

**Alternatives are defined as having low correlation to other classes and lower risk than Equities (standard deviation <60% of S&P 500). Includes Commodities, REITs, Long/Short strategies, Managed Futures.*

8.3.3. Rebalancing Strategic Allocation. The percentage allocation to each asset class may vary depending upon market conditions. When necessary and/or available, cash inflows/outflows will be deployed in a manner consistent with the strategic asset allocation of the portfolio. If there are no cash flows, the Financial Guidance Committee will monitor the portfolio at least quarterly and, when the assets are outside of their stated ranges, will rebalance them back to within the policy ranges, unless extreme market conditions require implementation of prudent alternatives.

8.3.4. Spending and Liquidity Policy

Purpose: The Legacy League Fund supports awards, education and outreach, and any other purposes deemed appropriate by the Executive Committee to support the Society’s activities consistent with the mission. SVP is a charitable organization under §501(c)(3) of the U. S. Internal Revenue Code; its income is generally exempt from Federal and State Income tax with the exception of Unrelated Business Taxable Income (UBTI). Since UBTI can be generated by leveraged investments (resulting in "debt-financed income"), SVP will not utilize leveraged investment strategies unless the Investment Advising Team grants a specific exception.

- **Spending Rate:** In a typical year, award payouts amount to approximately 4% of the fund balance.
- **Preservation or Corpus:** Award amounts should be set to preserve the principal of the Fund in perpetuity. If a specific fund’s balance drops below the minimum required to

generate the necessary income (due to market conditions or administrative costs), the stipend may be reduced.

- **Reserves:** The Legacy League Fund must maintain a cash position of at least \$300,000 USD.
- **Investment Restrictions:**
 - **Direct Fixed Income:** Must be rated “BBB” or higher; maturity <14 years.
 - **Direct Equity:** Max 20% in one industry; max 5% in one company.
 - **Prohibited Investments:** Private placements, unregistered securities, direct options, foreign securities (except via mutual funds), short selling, margin trading, physical commodities, and limited partnerships
 - **Leverage:** No leveraged strategies (debt-financed income) to avoid Unrelated Business Taxable Income (UBTI).

8.4. Roles and Responsibilities

8.4.1. Financial Guidance Committee (FGC). The FGC is convened by the Executive Committee. As fiduciaries of SVP’s investments, the FGC has the following primary responsibilities:

- Prepare and maintain the Investment Policy Statement
- Review investment manager performance and adherence to policy
- Determine if the portfolio has been managed in accordance with investment policy and confer with the investment manager(s) about any deviations.
- Recommend changes to IPS, strategies or managers to the Executive Committee
- Avoid prohibited transactions/conflicts of interest.

8.4.2. Investment Advising Team

- **Advisor:** Objective third-party professional guiding the FGC through a disciplined and rigorous investment process.
- **Separate Account Manager(s):** May be hired to manage assets under their supervision in accordance with guidelines, objectives, and stipulations outlined in their respective Service Agreements, Prospectus or Trust Agreement.
 - Exercise full investment discretion with regards to buying, managing, and selling assets held in the Portfolio.
 - Vote promptly all proxies and related actions in a manner consistent with the long term interest and objectives of the Portfolio as described in this IPS. Each investment manager shall keep detailed records of the voting of proxies and related actions and will comply with all applicable regulatory obligations.
 - Communicate to the Financial Guidance Committee all significant changes pertaining to the fund it manages or the firm itself. Changes in ownership, organizational structure, financial condition, and professional staff are examples of changes to the firm in which the organization is interested.
 - Effect all transactions for the Portfolio subject to “best price and execution.” ‘

- Use the same care, skill, prudence, and due diligence under the circumstances then prevailing that experienced investment professionals, acting in a like capacity and fully familiar with such matters, would use in like activities for like Portfolios with like aims in accordance and compliance with all applicable laws, rules, and regulations.
- **Custodian(s):** responsible for the safekeeping of the organization's assets. Custodians will value the holdings; collect income and dividends owed to organization; settle transactions (buy/sell orders); and provide quarterly reports that detail transactions, cash flows, securities held and their current value and change in the value of each security, as well as the overall Portfolio since the last report.

8.4.3. Implementation. The Financial Guidance Committee will apply the following due diligence criteria in selecting each money manager or mutual fund:

- **Regulatory oversight:** Each investment option should be managed by: (i) a bank; (ii) an insurance company; (iii) a registered investment company (mutual fund); or, (iv) a registered investment adviser.
- **Correlation to style or peer group:** The investment option should be highly correlated to the asset class being implemented. This is one of the most critical parts of the analysis since most of the remaining due diligence involves comparisons of the investment option to the appropriate peer group.
- **Performance relative to a peer group:** The investment option's performance should be above the peer group median for 3 and 5 year cumulative periods.
- **Performance relative to assumed risk:** The investment option's risk adjusted performance (Alpha and/or Sharpe Ratio) should be above the peer group median manager's risk adjusted performance for 3 and 5 year cumulative periods.
- **Minimum track record:** The investment option should have been incepted 3 or more years ago so that performance statistics can be properly calculated.
- **Assets in the product:** The investment option should have at least \$75 million under management so that the portfolio manager can properly trade the account.
- **Holdings consistent with style:** At least 80% of the underlying securities of the investment option should be consistent with the associated broad asset class.
- **Expense ratios/fees:** The investment option's fees should be fair and reasonable. The performance of each investment should be measured against its expenses.
- **Stability of the organization:** There should be no perceived organizational problems, and the same Plan management team should have been in place for at least two years.

8.4.4.5 Monitoring and Review.

The Financial Guidance Committee acknowledges fluctuating rates of return characterize the securities markets, particularly over short term time periods. Recognizing that short term fluctuations may cause variations in performance, the Financial Guidance Committee will evaluate investment performance from a long term perspective.

The Financial Guidance Committee is aware the ongoing review and analysis of the investment options is just as important as the due diligence process. The performance of the investment options will be monitored on an ongoing basis and it is at the Financial Guidance Committee’s discretion to take corrective action by replacing a manager if they deem it appropriate at any time.

On a timely basis, but not less than quarterly, the Financial Guidance Committee will review reports provided by the investment advisor to determine whether each investment option continues to conform to the search criteria outlined in the Implementation section; specifically:

- The investment option's adherence to the due diligence criteria.
- Material changes in the investment option's organization, investment philosophy and/or personnel.
- Any legal, SEC and/or other regulatory agency proceedings affecting the investment option's organization.

8.4.4.6. Benchmarks

The Financial Guidance Committee has determined that performance objectives be established for each investment option. Manager performance will be evaluated in terms of an appropriate market index and the relevant peer group.

Peer Group	Benchmark
Term Fixed Income	Barclays Capital Aggregate Bond Index
International Fixed Income	Citigroup World Gov’t Bond
Large-Cap Equities	Russell 1000
Small to Mid-Cap Equities	Russell 2500
International Equities	MSCI World ex US
Alternatives	HFRI Fund of Funds Index

8.4.4.7. Watch List Criteria

An investment option may be placed on a Watch List and a thorough review and analysis of the investment option may be conducted, when:

- An investment option performs below median for their peer group over a 3 and/or 5 year cumulative period.

- An investment option's 3 year risk-adjusted return (Alpha and/or Sharpe) falls below the peer group's median risk adjusted return.
- There is a change in the professionals managing the investment option.
- There is a significant decrease or increase in the investment option's assets.
- There is an indication the investment option is deviating from the stated style and/or strategy.
- There is an increase in the investment option's fees and expenses.
- Any extraordinary event occurs that may interfere with the investment option's ability to prudently manage investment assets.

The decision to retain or terminate an investment option cannot be made by a formula. It is the Committee's confidence in the investment option's ability to perform in the future that ultimately determines the retention of an investment option.

8.4.4.8. Measuring Costs. The Executive Committee will review, at least annually, all costs associated with the management of the portfolio.

8.4.4.9. Investment Policy Review. The Executive Committee will review this IPS at least annually to determine whether stated investment objectives are still relevant and the continued feasibility of achieving the same. It is not expected that the IPS will change frequently. In particular, short term changes in the financial markets should not require adjustments to the IPS.

9. Donations to the Society

The following guidelines detail how the Society governs the acceptance of new funds. All monetary gifts, once accepted, are invested and managed in accordance with the Investment Policy Statement [**Section 8.**].

9.1. Purpose and Scope. The Society of Vertebrate Paleontology (SVP) welcomes monetary gifts that advance its mission. This policy governs the acceptance of major gifts, defined as contributions of **\$5,000 or greater**, whether given outright, through investment transfers, or via estate planning.

Gifts valued at **\$4,999 or less** are considered minor gifts. These do not require formal review and are deposited directly into the existing fund indicated by the donor (or the Legacy League if undefined). Minor gifts may not carry donor-designated restrictions. Additionally, the Society does not accept gifts of real estate, personal property, or tangible items requiring valuation, maintenance, or liquidation.

9.2. Oversight and Authority. The Executive Committee holds ultimate authority over gift acceptance, supported by the Development Committee.

- **Conflict of Interest:** Committee members with a personal connection to a donor must recuse themselves from the review process.
- **Irrevocability:** Once accepted and deposited, all gifts are permanent and irrevocable.

9.3. Proposal and Acceptance Process

To initiate a **major gift**, donors must submit a formal proposal using the Society’s standard template (Addendum 4).

1. **Review.** The Development Committee reviews the proposal for alignment with SVP’s mission and financial feasibility.
2. **Approval:** The Executive Committee votes on the proposal to make a final decision.
3. **Agreement:** Acceptance is formalized through a Memorandum of Understanding (MOU) (Addendum 5).

9.4. Restricted and Unrestricted Gifts Major gifts may be unrestricted (utilized at the discretion of the Executive Committee) or restricted. Restricted gifts must meet specific criteria:

- **Named Funds:** To track monies independently in a donor-named fund, the gift must meet a minimum threshold of **\$50,000**. If a donor wishes to build this fund over time, they must reach the \$50,000 minimum within five years; otherwise, funds will revert to the general Legacy League Fund.
- **New Awards:** Donors proposing new awards must demonstrate that the award covers a unique area of research not currently recognized. While donors may propose the award concept, they are strictly prohibited from participating in the selection process, setting criteria, or influencing outcomes.
- **Internal Tracking:** For accounting purposes, restricted funds are pooled within the Legacy League investment account but tracked internally by Society accountants.
- **Modification:** If a restricted gift’s original purpose becomes impractical or irrelevant over time, the Executive Committee reserves the right to redirect the funds to a purpose as close as possible to the donor's original intent.

9.5. Gift Plans and Accepted Assets. SVP accepts gifts in the form of cash, publicly traded securities, and beneficiary designations (retirement plans or life insurance).

Outright Gifts: Immediate, permanent transfers of assets (cash or securities) placed at the Society’s disposal via the Legacy League Fund.

Planned Gifts: Future contributions via bequests, trusts, or scheduled donations.

- **Recognition:** Donors are eligible for recognition upon documentation of planned gift.
- **Valuation:** Only funds actually received are recorded as finalized gifts. “Promised” monies (e.g., life insurance policies not yet matured) are recorded as pledges.

Accepted Assets:

- **Cash** Accepted via check, wire transfer, or verified credit card transaction.
 - **Payee:** Checks must be payable to "The Society of Vertebrate Paleontology."
 - **Date:** For mailed gifts, the postmark date serves as the official gift date.
- **Securities** The Society accepts publicly traded stocks and bonds.
 - **Liquidation:** Policy dictates that all securities are sold immediately upon receipt.
 - **Transfer:** Electronic transfer directly to the Society's investment account is preferred.
- **Beneficiary Designations** Donors may name SVP as a primary or secondary beneficiary of retirement plans (IRA, 401k) or life insurance policies. These are recorded as pledges until funds are realized.

9.6 Donor Recognition. The Society respects donor privacy, including requests for anonymity. Standard recognition includes listing major donors (\$5,000+) in the annual program book and other listings of Legacy League Members.

9.7 Legal and Financial Considerations Prospective donors are responsible for securing their own legal and tax counsel. The Society provides receipts for tax purposes but does not offer tax advice. Administrative costs associated with managing awards or funds will be deducted from the fund balance. If a fund's balance drops below the minimum required to support a payout, the award stipend may be reduced or paused.

9.8 Policy Review The Development Committee periodically reviews these policies and recommends revisions to the Executive Committee.

SOCIETY OF VERTEBRATE PALEONTOLOGY PROFESSIONAL CONDUCT DISCLOSURE

Candidate Name: _____ Position Sought: _____

To ensure a safe and professional environment for all members, the Society requires all volunteers to attest to their history of professional conduct.

By signing below, I certify that:

1. I have **not** been the subject of a substantiated finding of sexual harassment, sexual assault, or other harassment by any employer, court, or professional organization.
2. I have **not** been found to have committed scientific or professional misconduct (including fabrication, falsification, or plagiarism) by a research institution, funding agency, or publisher.
3. I do **not** have any active professional sanctions or license revocations against me.

Declaration (Select One)

OPTION A: NO FINDINGS I attest that the statements above are true. I have no history of substantiated misconduct, harassment, or professional sanctions to disclose.

OPTION B: DISCLOSURE REQUIRED I cannot attest to one or more of the statements above. I have attached a confidential written explanation of the circumstances, date, and outcome of the specific finding(s) for the Ethics Committee to review.

Ongoing Obligation

I understand that if a finding of misconduct is made against me during my tenure as a volunteer, I must notify the Society leadership immediately. I understand that falsification of this document is grounds for immediate disqualification or removal from office.

Signature: _____ Date: _____

Addendum 2 – SVP Futures Award Letter of Support Template

{DATE}

Dear SVP Futures Award Committee,

If {APPLICANT NAME} is selected to receive the SVP Futures Award, I certify that I am willing and able to serve as the research mentor for the project described in the application. I also certify that I will abide by the SVP Code of Conduct and procedures and rules of the Futures Award.

Sincerely,

{SIGNATURE}

{NAME AND AFFILIATION}

Mentor's Certification of Responsible Stewardship

Each project should be supervised by an appropriate mentor with experience in the field. The mentor will support the applicant and provide field training. All areas where Field training will take place will have health and safety regulations in place, and these regulations shall be followed by the mentor and the applicant. By agreeing to mentor an applicant, the mentor also confirms that all required legal permissions, including permits, whether from governmental entities and/or landowners, have been secured in advance of the planned fieldwork, and that the work adheres to the SVP Bylaws, Article 12, Code of Ethics. The mentor and awardee also agree to abide and uphold the standards of behavior described in the SVP Code of Conduct.

Mentor

Name

Signature

date

Addendum 4: Gift Proposal Template

Instructions: This form must be completed for all gift proposals valued at \$5,000 or greater. Please submit this form to the Development Committee for initial review.

1. Donor Information

- **Name(s):** _____
- **Organization (if applicable):** _____
- **Address:** _____
- **Email:** _____ **Phone:** _____
- **Relationship to SVP:** Member Non-Member Corporation Estate

2. Gift Description

- **Estimated Value:** \$ _____
- **Type of Asset:** Cash / Check / Wire Transfer Publicly Traded Securities (Stocks/Bonds)
Note: Securities are liquidated upon receipt. Beneficiary Designation (Retirement Plan / Life Insurance) Bequest / Will Other: _____

3. Designation of Funds

- **Unrestricted Use:** Funds may be used for the general support of the Society at the discretion of the Executive Committee.
- **Restricted Use:** Funds are designated for a specific purpose.
 - **Proposed Fund Name:** _____
 - **Specific Purpose:** _____
 - *Note: Separate, named funds require a minimum corpus of \$50,000. If the initial gift is less than \$50,000, the Donor agrees to reach this threshold within five (5) years.*

4. New Award Proposals (If applicable)

- **Title of Proposed Award:** _____
- **Target Field/Subject:** _____
- **Gap Analysis:** Please briefly explain how this award covers a specific area of Vertebrate Paleontology not currently recognized by existing SVP awards:

5. Donor Acknowledgements (Please Initial)

- I understand that the Society of Vertebrate Paleontology (SVP) has full authority over the investment and management of these funds in accordance with the Society's Investment Policy.
- If proposing an award, I understand that I may not participate in the selection process, nominate candidates, or determine the final recipient.
- I understand that administrative costs may be deducted from the fund balance as described in the Society Handbook.

Submitted By: _____ **Date:** _____

Addendum 5: Gift Acceptance Memorandum of Understanding (MOU)

This Memorandum of Understanding is entered into between [Donor Name] ("Donor") and the Society of Vertebrate Paleontology ("Society").

1. Purpose of the Gift The Donor agrees to contribute assets valued at approximately \$_____ to establish the [*Name of Fund*]. The primary purpose of this Fund shall be:

2. Administration and Investment The Gift will be administered by the Society in accordance with its Investment Policy Statement.

- **Pooling:** For investment purposes, the assets of the Fund may be commingled with other investment assets of the Society (The Legacy League).
- **Accounting:** The Fund will be tracked as a separate account in the Society's financial records.
- **Thresholds:** If the Fund is intended to be a permanent named fund, the Donor agrees to contribute a minimum of \$50,000 within five (5) years of this agreement. If this minimum is not met, the Society reserves the right to merge the assets into the general Legacy League Fund.

3. Irrevocability The gift is irrevocable. Once the assets are transferred to the Society, the Donor releases all rights to ownership and control of the assets.

4. Variance Power (Change of Circumstances) If, in the judgment of the Executive Committee, the original purpose of the Fund becomes illegal, impractical, or no longer meets the needs of the Society due to changed conditions, the Executive Committee shall have the authority to modify the purpose of the Fund. Any such modification shall be as consistent as possible with the Donor's original intent.

5. Conflict of Interest & Awards If this Fund supports an award or grant, the selection of recipients will be made solely by the appropriate Society committee. To ensure fairness and avoid conflicts of interest, the Donor and their immediate family shall not serve on the selection committee or influence the selection process.

AGREED AND ACCEPTED:

For the Donor: Signature: _____ Date: _____

Printed Name: _____

For the Society of Vertebrate Paleontology:

Signature (President): _____ Date: _____

Signature (Treasurer): _____ Date: _____

Appendix 1. Annual Meeting - Host Committee and Business Office Duties

Business Office	Host Committee
Coordinate early planning (ideally 2+ years out)	Initiate contact early if interested in hosting (2+ years out)
Liaise with convention bureaus and support venue/hotel sourcing	Connect with local convention bureaus or conference planners
Provide 10 complimentary registrations	Allocate gratis registrations (usually for student volunteers)
Manage meeting website and communications	Provide logo, "Save the Date" content, welcome letter, and images
Post web content and meeting details	Identify local museum access, tours, or discounts
Provide base funding (\$15,000 USD) for Welcome Reception	Organize Welcome Reception (venue, logistics, fundraising)
Handle funds and payments (U.S. meetings)	Raise additional funds for welcome reception; manage funds (non-U.S. meetings)
Solicit sponsors and exhibitors (excluding Welcome Reception)	Identify potential sponsors/vendors and share leads
Oversee program submission and approval process	Solicit and review field trip/workshop proposals
Support logistics for public lectures	Optionally organize public lecture
Arrange site visit logistics	Participate in site visit
Coordinate shipping of materials	Receive and store materials (Prep Committee, auction items)
Coordinate meeting app/website content (e.g., restaurants)	Provide local restaurant recommendations
Support accessibility planning with committees	Conduct accessibility walkthrough with Diversity Committee
Assist with volunteer coordination	Recruit and schedule volunteers for reception desk
Coordinate publicity channels	Provide local media contacts and photographers
Manage merchandise ordering, payment, and logistics	Select merchandise, vendors, and provide product details/images
Coordinate delivery of merchandise to venue	Assist with on-site merchandise handling
Assist with event logistics (e.g., entertainment coordination guidance)	Suggest entertainment for post-banquet event